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An exploration of the factors that influence the career exit and early retirement of women teachers

AN EXPLORATION OF THE FACTORS THAT INFLUENCE THE CAREER EXIT AND EARLY RETIREMENT OF WOMEN TEACHERS

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ABSTRACT

In recent years, there has been growing concern about the recruitment and retention of teachers in state schools where there are unprecedented numbers of teacher vacancies, particularly in inner-city schools. Teachers leaving the profession tend disproportionately to be female and approaching retirement. This research considers the factors that influence the career exit of women teachers in their fifties. Three themes were chosen to investigate why some teachers do, and others do not, retire early: the work/life balance, the changing context of early retirement, and educational and social change. Semi-structured interviews provided data from teachers, aged between 50 and 60, either working in, or recently retired from, primary and secondary inner-city state schools. Findings from the research indicate that three key factors are evident in women teachers' retirement decisions: choice, change and challenge. These three strands are intertwined with one another.

Retired teachers had made their decision in the context of financial security, enabling them to choose early retirement, whereas working teachers indicated that their financial circumstances were less favourable. Education policy changes, particularly school inspections, the National Curriculum, and disciplinary issues had created a working environment cited by retired teachers as a 'push' factor from the profession. Teachers who had continued working possessed a more positive attitude to change in both their personal and professional lives. On leaving full-time teaching, the retired teachers had chosen a new work/life balance, with primary teachers often influenced by non-work 'pull' factors and secondary teachers taking up new career challenges. Paradoxically, those teachers who had no early retirement plans regarded recent social and educational change as part of the challenge of remaining in teaching. The teachers' retirement decisions were made in the context of earlier lifecourse experiences and demonstrated the heterogeneity of women as individuals, as teachers and in early retirement.

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I declare that the work in this dissertation was carried out in accordance with the Regulations of the University of Bristol. The work is original, except where indicated by special reference in the text, and no part of the dissertation has been submitted for any other academic award. Any views expressed in the dissertation are those of the author.

SIGNED: ..... DATE: 18 July 06

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INTRODUCTION

CHAPTER 1: EXPLAINING 'WOMEN'S WORK': CONSTRAINT, CHOICE AND THE WORK/LIFE BALANCE

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LIST OF ABBREVIATIONS

A level	Advanced level
CSE	Certificate of Secondary Education
DES	Department of Education and Science
DfE	Department for Education
DfEE	Department for Education and Employment
DfES	Department for Education and Skills
DWP	Department for Work and Pensions
EAZ	Education Action Zone
ERA	Education Reform Act
FE	Feminist empiricism
FS	Feminist standpoint
GCE	General Certificate of Education
GCSE	General Certificate of Secondary Education
GTC	General Teaching Council
HMCI	Her Majesty's Chief Inspector
ICT	Information and Communications Technology
IT	Information Technology
ITT	Initial Teacher Training
LEA	Local Education Authority
LMS	Local Management of Schools
NAHT	National Association of Head Teachers
NASUWT	National Association of Schoolmasters Union of Women Teachers
NHS	National Health Service
NUT	National Union of Teachers
O level	Ordinary level
OFSTED	Office for Standards in Education
PF	Postmodern feminism
SATs	Standard Assessment Tasks
TES	*Times Educational Supplement*
TPS	Teachers' Pension Scheme
TTA	Teacher Training Agency
TTC	Teacher Training College
UK	United Kingdom
US	United States

INTRODUCTION

- **The research context**
- **Aims of the research**
- **Research questions to be addressed**
- **Research themes and thesis plan**

▪ The research context

The recruitment and retention of teachers in state education is currently presenting a serious problem for the government. The number of vacant posts is unprecedented, particularly in inner-city schools and in some specific subject areas. Although many younger teachers, particularly men, leave the profession for alternative careers after only a few years, a key area of concern is the disproportionate number of older teachers, particularly women, who are retiring before 60, the age of entitlement to a teacher's pension.[1] This is not only depleting the supply of more experienced staff in schools but also, significantly, coincides with another area of concern for government, that of the so-called 'pension crisis.' Following a rise in the number of people retiring early, particularly from the 1980s onwards, governments are now attempting to persuade older people to stay in employment up to, and beyond statutory retirement age, thereby delaying claiming their pension.[2]

This research explores the factors influencing the early retirement of women teachers between the ages of 50 and 60 from inner-city state schools in a unitary authority in the south west of England, referred to here as the Study City.[3] The population of the city grew

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[1] See Smithers & Robinson (2003), a study commissioned by the DfES that looked at the factors affecting teachers' decisions to leave the profession.

[2] See the Turner Pensions Commission First Report: 'Pensions: Challenges and choices' (2004) and Second Report: 'A new pension settlement for the twenty-first century' (2005). In addition to the emphasis on later working, a chapter is devoted to the implications of pension reform for women and carers.

[3] League tables published in January 2006 show that the Study City is the worst performing local education authority in the country, with eight secondary schools in the bottom 200 in the country for the proportion of pupils gaining top-grade GCSEs.

by about 5% between 1991 and 2001 to over 551,000. The former county council was divided into four unitary authorities under local government reorganisation in 1996, creating the inner-city area that is the focus of this research, and three surrounding areas that include the city's outskirts and bordering rural areas.

- **Aims of the research**

The principal aim of the research is to discover the reasons why women are retiring early from the teaching profession through an exploration of factors that influence their retirement decisions and plans. This will include both the personal circumstances of their lives as women outside their working environment, and their professional working lives as teachers, closely linked to changes in the educational work environment during their careers.[4] It is hoped that the research will lead to:

- An improved understanding of the structural and social circumstances that influence the 'choices' and decisions women make regarding work and paid employment during their life-course. How do women prioritise in attempting to achieve a work/life balance and in what way does this link to their retirement decisions? To what extent are such decisions influenced by structural factors or by social and family life outside work?

- A greater understanding of the 'push' and 'pull' factors that influence the decision of women to retire prematurely from the teaching profession. Which are the repelling, and which the attractive factors? In the context of a trend towards earlier retirement and longer life expectancy, this is a serious issue for government policy that is now attempting to address ways of encouraging older workers to stay in paid work for longer.[5] It is particularly relevant to the teaching profession given the shortages of experienced, qualified staff.

- It is hoped that the research will contribute to academic knowledge and understanding of feminist theories of women's employment by adding to a feminist theory of the

[4] See Bell 1995, Ferguson 1994, Helsby & McCullock 1996, Sikes 1985
[5] For a government perspective, see Department for Work & Pensions 2005 & 2002, Mayhew 2001, and for a more gendered approach see Ginn 2001.

diversity of women's experiences. Functionalist theories and the two separate spheres of 'work' were challenged during the 1970s by radical and socialist feminists who argued that social and economic structuring explained women's position in the social world, both in terms of the workplace and the family.[6] Others emphasised individualist explanations including individual choice/preference and human capital theory.[7] Since the early 1990s, 'difference' feminism has sought to explain the gendered division of labour by emphasising differences *between* individual women, as well as differences between men and women.[8]

- **Research questions to be addressed**

The principal research questions to be addressed by this research are:

In what ways do women teachers' life-course experiences of balancing work and family commitments affect their retirement planning? Questions in the context of the life-course include teachers' route of entry to the profession, qualifications and training, marriage/partnerships, children, career breaks, promotions, ill health and moving to a new geographical location. These questions address the non-work 'pull' factors that are significant in the retirement decision since they include aspects of women's lives such as caring responsibilities and the influence of family relationships.

What reasons do those who have retired early from teaching give for doing so? Are financial circumstances a factor in the decision-making process? Is their husband/partner retired? How are they spending their time in so-called 'retirement'? Are they undertaking paid employment or enjoying a leisurely retirement away from work? These questions address individual perceptions of and preparedness for retirement, particularly in terms of financial resources, and the transition from full-time work to full-time retirement.

Why have the teachers who are still working full-time <u>not</u> retired early? What plans do they have for the timing of their retirement? Are they intending to continue teaching

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[6] Walby 1986, Hartmann 1976, Barrett 1980
[7] Hakim 1979, 1996, Becker 1993
[8] Barrett 1987, Stanley & Wise 1992

until they become entitled to their teachers' pension? These questions address the work-related 'pull' factors that keep these teachers in the teaching profession and also ask whether or not they feel that they are in a position to choose retirement.

To what extent have education policy changes acted as a factor influencing women teachers to exit their career? What is the role of social change in the context of teachers' work and retirement? These questions address work-related 'push' factors and include not only recent educational policy changes *per se*, but also the speed of their introduction, as well as related aspects such as perceived loss of professional status, increased workload and administrative burden, and individual teachers' adaptation to change. They also explore the role of social change through the behaviour of pupils and their parents in what is generally acknowledged to be a less respectful social environment.

- **Research themes and thesis plan**

The three key themes of this research are:

- Women and the work/life balance
- Early retirement
- Education policy and women teachers

Chapter 1: 'Explaining 'women's work': constraint, choice and the work/life balance' explores constraint and choice in the public and private spheres of women's work commitments in paid employment and in the domestic context. The chapter looks at theoretical explanations of the gendered division of labour from the structuralist/materialist theories of Sylvia Walby and Heidi Hartmann, 'difference' theory developed by Michelle Barrett and the individualist 'preference' and human capital theories of Catherine Hakim and Gary Becker. The increase in the number of women entering paid employment has been one of the major social changes in Britain since the Second World War (Crompton:1997). A buoyant labour market, together with rapid expansion of the number of women entering higher education provided new opportunities for work and education not experienced by earlier generations (Evandrou:1997). But it can be problematic for many women to achieve a satisfactory balance between their private and public, their personal

and professional lives. The 'push' and 'pull' factors that influence the work/life balance during women's working lives are explored in Part 2 of Chapter 1, together with issues of occupational segregation and the effects of class, age and employment status. Part 3 moves to the domestic context and looks at the way in which girls are socialised into a gendered division of domestic labour including caring roles. The chapter concludes by asking whether or not teaching was or is ideal 'women's work' (Myrdal & Klein:1968).

Chapter 2: 'The changing context of retirement: Perspectives, policies and pensions' starts with a brief outline of the development of pensions and retirement, and occupational pensions and early retirement. Mid-life women's labour force participation and their retirement have been relatively neglected in spite of US research showing that retirement is as salient an issue for women as for men (Szinovacz in Arber & Ginn:1996). Women's work histories vary with respect to educational level, age, generation and demographic variables such as ethnicity, health, marital status and number of children (Shaw 1983). Their years in paid employment are often discontinuous with periods of both part- and full-time work, and complete breaks for childbearing and caring commitments, all of which impact on their financial position in retirement. 'Women are *the* problem in terms of adequate pension support, and...will be an increasing proportion of the future workforce' (Macnicol:1999:404). Women's work patterns reduce both occupational and state pension entitlements, including teachers' pensions, and these twin factors are important in their retirement planning where retirement is a matter of choice. Part 1 of Chapter 2 explains the social construction of retirement, looking at changes in perceptions and patterns of early retirement and the way in which retired people can no longer be regarded as a homogeneous group, but are characterised by wide diversity and heterogeneity. Part 1 also looks at the retirement debate in terms of intergenerational equity and demographic change. Part 2 explores financial provision for retirement, through pensions and savings, from the perspectives of the state and the individual, whilst Part 3 focuses specifically on women and teachers looking at the gendered context of pensions, professional women and teachers' pension schemes. For the purpose of this research, early retirement is defined as career exit prior to occupational and state pension age, both of which, for women teachers, are currently 60.

Chapter 3: 'Gender and the education system: The impact of educational change on women teachers' focuses on state education and women teachers within it. Part 1 discusses the 'feminization' of education and compares and contrasts women in the primary and secondary sectors. The age cohort of women who are the subject of this research is particularly interesting. Not only have they been able to pursue their teaching careers as well as being wives and mothers, unlike their predecessors who were restricted by the marriage bar, but also because they have been in the profession through a series of major changes that have radically altered teachers' working environment. Shortly after qualifying, the policy of closing grammar and secondary modern schools and replacing them with comprehensives represented a major change for secondary school teachers. The 1988 Education Reform Act (ERA) contained sweeping measures that simultaneously concentrated and diffused power within the education system. The development of comprehensives, the ERA and the OFSTED inspection regime form a purposive selection of education policies that are the subject of Part 2. These policies were selected as potentially the most influential on the teachers in this research. Part 3 then explores the impact of educational change on women teachers' retirement decisions by looking in detail at five areas: policy 'push' factors, teacher professionalism, the work/life balance, the 'masculinisation' of educational management and the way in which pupils and parents may themselves become 'push' factors.

Chapter 4: 'Methodology and Methods', as the title suggests, is divided into two parts, the first of which focuses on the methodological framework of the research and the second on the methods used to gather data. Part 1 explores the central concepts of feminist methodology and the three 'feminisms' of Sandra Harding, before looking in more detail at the choice of a postmodern feminist methodological framework for this research. Part 2 traces the story of the data collection process from the reasons behind the decision to use qualitative methods, specifically semi-structured interviews, through the interview design, pilot interviews, sampling and the interviews themselves. Finally there is a discussion of relevant ethical issues and the data analysis process.

The findings presented in **Chapters 5, 6 and 7** are directly related to the theoretical discussions contained in Chapters 1, 2 and 3. The focus of **Chapter 5** is the work/life balance and the data reveal that an overwhelming majority of the teachers interviewed are in long-term marriages, are mothers and had career breaks associated with their family

lives. The findings here indicate some differences between primary and secondary teachers in their reasons for choosing teaching, their routes into the profession and subsequent career/family orientation. They also show contrasting attitudes towards the concept of change in both personal and professional lives. **Chapter 6** contains data relating to the retirement decision, and reveals the importance of financial security as a factor in early exit from teaching. They also show the significance of a husband or partner in the retirement transition, and the contrasting ways in which the retired teachers spend their time, with the primary teachers tending to continue as supply teachers and the majority of secondary teachers embarking on new careers. **Chapter 7** gives the detailed findings on the teachers' working lives and the ways in which educational and social change act as 'push' factors towards early retirement. The data show that all the teachers interviewed had found education policy changes problematic to some degree. However, whilst primary teachers seemed to find the National Curriculum and OFSTED inspections the most difficult to contend with, secondary teachers tended to be more critical of league tables and of deteriorating behaviour and disciplinary problems in the classroom.

Chapter 8 – 'The factors that influence the career exit and early retirement of women teachers' starts by giving a summary of the main findings of the research before concluding that they suggest that there are three key elements that combine to influence the early retirement decision: choice, change and challenge. The findings indicate that choice is a major factor in the early retirement decision, and that more teachers might retire from the profession prematurely if they felt that they had a realistic choice. Challenge appeared to work in two contrasting ways, either as a catalyst to retire given the existence of a new challenge outside teaching, or as a reason for staying in teaching and meeting the challenge of cumulative educational change. Change has had a major impact on women teachers not only in terms of education policy, but also as a result of changes more broadly in society and within themselves as individuals.

CHAPTER 1

EXPLAINING 'WOMEN'S WORK': CONSTRAINT, CHOICE AND THE WORK/LIFE BALANCE

'Careers are provisional, kaleidoscopic constructions, made up of everyday events and interchanges, surrounded by dimly perceived structural constraints and characterized by change which – by definition – never stops'[1]

INTRODUCTION

- **Women's work in context**

PART 1: THEORETICAL EXPLANATIONS OF THE GENDERED DIVISION OF LABOUR

- **Constraint: Structuralist and materialist explanations**
- **Choice: Individualist explanations and 'preference' theory**
- **Postmodern feminism and heterogeneity**

PART 2: THE INTERACTION OF CONSTRAINT AND CHOICE IN WOMEN'S EMPLOYMENT

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- **The socialisation process**
- **The domestic division of labour**
- **Women, caring and the family**

PART 4: COMBINING 'TWO SPHERES': IS TEACHING IDEAL WOMEN'S WORK?

CONCLUSION

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[1] Acker:1999:166 - *The Realities of Teachers' Work*

INTRODUCTION

The male breadwinner model describes the gendered division of labour that emerged with the process of industrialisation and the development of capitalism in Western societies, and became incorporated into major institutions including welfare states, education systems, and labour market and occupational regulation (Crompton:1999:201-2). Examples of this incorporation included retail opening hours, the school day, the marriage bar to women teachers, and the way in which professions excluded or made entry difficult for women until the 1990s. The model was essentially a middle class one, since for the working class there was no sole breadwinner and all family members worked when and wherever they could.

After a brief historical overview, setting 'women's work' in context,

- Part 1 of this chapter explores theoretical explanations of the gendered division of labour, looking at structuralist and materialist explanations in the work of Heidi Hartmann and Sylvia Walby. Secondly it examines Catherine Hakim's argument that individual choice, rather than structural constraint, is the key determinant of women's position in the labour market before giving an overview of postmodern feminism.
- Part 2 examines the interaction of constraint and choice in women's paid work, looking at issues such as occupational segregation and the polarising effect of class, age and employment status.
- The focus of Part 3 is on the domestic sphere and the way in which girls are socialised into the domestic and caring roles that characterise women's unpaid work for home and family.
- Part 4 looks specifically at teaching and asks whether or not it was, or indeed still is, the 'ideal' work for women in terms of combining the two spheres of paid and unpaid work.

- **Women's work in context**

For centuries an ideology of two separate spheres of work existed in which there was a distinct division between the world of paid employment and that of unpaid domestic labour. These were gender coded with men engaged in economically productive work, whilst

women were largely confined to the domestic sphere of homemaking. This division of labour was reproduced in Talcott Parsons' (1949) functional theory of the modern family in which 'family' (female) and 'economy' (male) were viewed as distinct entities, and where the family carried out specific functions, such as reproduction and nurturing, for the economy. Furthermore, this separation entailed the identification of men with public life and women with the private sphere of the household (Crompton:1997:7).

Two world wars brought significant numbers of women into the workforce, but many returned to domesticity during the 1920s, primarily for structural reasons, when economic recession meant that men were given priority over women to such work as was available. The Trade Union movement supported the male breadwinner model by fighting for a 'family wage' sufficient for a man to keep his wife and children. However, the situation was somewhat different after World War II. The return of women to the domestic sphere was in the sociological context of the 1950s familialist ideology in which a married woman's paid work was seen as having a potentially detrimental effect on her children's development. 'Doctors, social workers, social scientists, magistrates and politicians all expressed their desire to see the family 'rebuilt' on traditional lines' (Lewis:1990:178). However, with a steadily growing economy and 'full' male employment, women were ready, willing and able to make an economic contribution, albeit usually on a part-time basis.

The war had little impact on the long-term position regarding the structure of work segregation. The workplace continued to be male dominated – a return to the pre-war gendered status quo - and responsibility for children and the home remained 'women's work'. The wartime experience, when women had been involved in traditionally 'male' work, was significant in that it revealed the extent to which 'the sexual division of labour is an artificial construct and not a 'natural' effect of sex differences in physique and personality' and showed how things could change given the support of both 'national will' and government (Bradley:1989:48).

The advent of 'second-wave' feminism, at a time of political change and rapidly transforming social norms, argued for 'a real equality with men which included equal access to all areas of employment and political life as well as the unpacking and transformation of stereotypical ideas governing relationships between men and women – hence the slogan that 'the personal is the political'' (Crompton:1997:1): equality in the

sphere of paid employment became a major objective of the movement. Furthermore, the idea that the taken-for-granted division of labour between men and women was a 'natural' one rather than a set of social arrangements was challenged, and it was argued that capitalism and/or patriarchy were the basis of women's subordination by men, both in the workplace and the home.

PART 1: THEORETICAL EXPLANATIONS OF THE GENDERED DIVISION OF LABOUR

Feminists writing in the 1950s had taken a relatively moderate position regarding women combining the family with paid employment. In *Women's Two Roles*, Myrdal and Klein[2] advocated a larger role for educated women beyond home and family but, despite wanting more choice for women, were not prepared to argue a gender-based analysis that would challenge the privileges exercised by husbands and male workers. They urged women to choose jobs that could be combined with childrearing, such as teaching, and accommodated post-war thinking on the family and women's role in it (Lewis:1990:184).

Functionalist theories and the two separate spheres of work were challenged during the 1970s by radical and socialist feminists who argued that social and economic structuring explained women's position in the social world, both in terms of the workplace and the family (Walby 1986, Hartmann 1976). Others emphasised individualist explanations including individual choice/preference and human capital theory (Hakim 1979, 1991, 1992, 1995, Becker 1981, 1993). Since the early 1990s, 'difference' feminism has sought to explain the gendered division of labour by emphasising differences *between* individual women, as well as differences between men and women (Barrett:1987, Stanley & Wise:1992). This post-structuralist 'turn' emphasises the diversity and heterogeneity of women. These theoretical frameworks will now be explored in greater depth.

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[2] Myrdal & Klein:1956 declared teaching to be a 'next to ideal' job for a woman to combine with marriage and motherhood. See Part 4 of this chapter.

- **Constraint: Structuralist and materialist explanations**

Marxist feminists argued that women's subordination could be explained in terms of what capital gained from the unpaid work of women in the home – the 'domestic labour debate'. This argument concentrated more on the needs of capital, and less on the recognition that men might also profit from the inferior position of women in the workplace, or their responsibility for domestic work (Bradley:1989:57). Sylvia Walby argued that the problem with this debate was that 'the interests that men, and in particular husbands, may have in the continuation and shaping of domestic work are almost totally neglected' (Walby:1996:20). At the other extreme, radical feminists rejected Marxism, arguing that gender was the primary form of social inequality, characterised by male dominance or patriarchy rooted in the family.

> 'Few academic feminists would now subscribe to either of these polar positions. Most would recognise the contributions made by both original perspectives, but accept that neither an account of patriarchy nor of capitalism alone will adequately explain sexual divisions and that an analysis in terms of both gender and class is needed' (Bradley:1989:58).

Sylvia Walby and Heidi Hartmann argued that patriarchy and capitalism are separate but interrelated in a 'dual-systems' approach.

> 'Gender inequality cannot be understood without the concept of patriarchy. Patriarchy does not exist in isolation; its intersection with capitalist...institutions significantly affects the nature of the consequent gender relations' (Walby:1996:243).

Walby defines patriarchy as a system of social structures in which men dominate, oppress and exploit women and argues that labour market structures (and patriarchy in the workplace) confine women to a subordinate position in the household. Furthermore, she suggests that men have successfully excluded women from the better, higher status, highly paid jobs, so women's options and choices are limited and that these are deliberate strategies undertaken by men in order to secure the best jobs whilst maintaining access to the domestic labour of women. She argues that within the male-breadwinner model of the family, women are definitely the losers (Crompton:1996:13). Her definition of patriarchy is based on domination in the domestic as well as other spheres. According to Harriet Bradley,

> '...the great strength of all Walby's work on patriarchy...is that it correctly emphasises the important presence of patriarchal structures in wage labour...and does not rest on the assumption that all women are primarily housewives' (Bradley:1989:55).

For Heidi Hartmann (1976), patriarchy is 'a set of social relations which has a material base and in which there are hierarchical relations between men, and solidarity among them, which enable them to control women' (p 447). Her focus is on the economic sphere of the workplace and men's control over women's labour power. She argues that following the development of capitalism, a gendered division of labour was important in perpetuating patriarchy. Women gained more opportunities for paid employment and in order to avoid erosion of their power, men ensured that women were excluded from better jobs and underpaid for the work they engaged in (Crompton:1997:10). Such division of the labour market into 'men's work' and 'women's work', occupational segregation, is, according to Hartmann

> '...the primary mechanism in capitalist society that maintains the superiority of men over women, because it enforces lower wages for women in the labour market. Low wages keep women dependent on men because they encourage women to marry. Married women must perform domestic chores for their husbands' (quoted in Crompton:1997:10-11),

So men win in both ways – by getting the best jobs with higher wages and by avoiding work in the domestic sphere. For Sylvia Walby, men operated exclusion strategies in the 19th century, and segregation strategies in the 20th century (Crompton op cit:12).

'Occupational segregation, as an indicator of women's inferior labour-market position, has occupied a central role in the theoretical frameworks developed by Hartmann and Walby' (Crompton:1999:4). They see it as a device that men have used to organise together to exclude women. This has served to lower the wages of women in the jobs that are available to them and pressurise women into economic dependence on men within the family. Men's demand for a family wage completes this 'vicious circle' where women are pushed away from paid work and into unpaid domestic work from which men benefit. 'Both men and capital are seen to gain from this arrangement' (Walby:1996:43). And for Hartmann 'the arrangement of sex-segregated jobs is the result of a long process of interaction between patriarchy and capitalism' (Hartmann:1976:468). In *Theorizing Patriarchy,* Sylvia Walby reviews numerous theories put forward in recent decades to explain women's subordinate position both in society and in the workforce, their

exploitation and oppression. Catherine Hakim, whose own theories are explored in greater detail in the next section, criticises Walby's discussion as being based on intellectual merits and explanatory adequacy rather than whether or not they are useful in making sense of the world. 'At the end of the day the key test of theory is against reality' (Hakim:1996:4).

Two further feminist theories of patriarchy and male dominance that I believe to be relevant to this discussion are those of Shulamith Firestone and Steven Goldberg. In *The dialectic of sex* (1974), Firestone argued that the source of male exploitation of women was rooted in the biological and cultural relationship between men and women. Her theory was that women's reproductive functions make them not only physically but also socially vulnerable during the period when they are bearing and rearing children, 'at the continual mercy of their biology', thus allowing men to take advantage to dominate and subordinate them (p17). In her 'revolutionary demands' she called for 'the diffusion of the child-rearing role to society as a whole, men as well as women' (p193) suggesting that childlessness offered one obvious avenue of 'escape'. Paradoxically, over the three decades since Firestone's work, the number of women in paid employment has risen, accompanied by a 'diffusion' of the child*care* role, but this role is carried out, almost entirely, by women paid to care for other working women's children. Whilst women may be freer to make certain choices about working outside the home, the overwhelming majority of childcare both in and outside the family is still done by women.

Steven Goldberg's theory of male dominance, in *The Inevitability of Patriarchy* (1973), focuses on the impact of physiology on social attitudes and behaviour as an explanation for differences in motivation and ambition and the reason why men are generally more assertive, aggressive, dominant and competitive (in Hakim:1996:5). Later updated in *Why Men Rule: A Theory of Male Dominance* (1993) Goldberg, to some extent, provides a theory that can be used to explain vertical job segregation and male domination of public hierarchies and one that is particularly relevant to the teaching profession.[3]

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[3] In interviewing women teachers, it has been evident that many of them are not interested in seeking promotion because they regard it as a competitive process that requires an assertive and dominant mindset that they perceive themselves to be lacking. However, I interviewed three primary head teachers who clearly possessed a different and contrasting self-image. Nevertheless, the fact remains that a disproportionate number of male teachers seek and gain promotion, an issue discussed in detail in Chapter 3.

- **Choice: Individualist explanations and 'preference' theory**

Catherine Hakim (1979) identified the phenomenon of occupational segregation and, in seeking to explain patterns of occupational segregation and the prevalence of part-time work, rejected the structuralist/materialist arguments of Hartmann and Walby and argued instead that individual tastes and preferences were more important. She identified two 'qualitatively different' groups of women classified according to their attachment to paid employment. The 'committed', those who prioritise their employment careers in a full-time job, with minimal time out for childbearing and childrearing, and the 'uncommitted' who give priority to their domestic responsibilities and may or may not work part-time.

> 'Expectations and aspirations are focused on what has been called the 'marriage career', with paid employment taking a back seat. Given this lower, secondary status among women's life goals...any minimally reasonable job will do, given that aspirations and efforts are focused in other life domains' (Hakim:1991:104).

Furthermore, she argued that many women invest little of themselves in paid work so that success or failure in that sphere becomes less important and easily satisfied, and that paid work is 'rarely' a central life interest for women taking, for most, a secondary role to family concerns (Ibid:105). In the context of twenty-first century choice and lifestyle options, Hakim has, more recently, developed what she calls 'preference theory'. She argues that women make work/lifestyle choices that are work-centred, home-centred or 'adaptive', the latter comprising a diverse, heterogeneous group that want to combine both work and family (Hakim:2000)[4].

These arguments lend support to rational-choice and human-capital theory (Becker:1993) which developed an economic explanation for the pattern of women's work and the division of labour within the family:

> '...the various divisions of labour among family members are determined partly by biological differences and partly by different experiences and different investments in human capital' (Becker:1981:14).

An individual can make an investment in his or herself by devoting time to studying, gaining additional educational qualifications or by acquiring skills and work experience. Although the benefits may not be immediate, they can be anticipated in the future: this is an

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[4] See Appendix 1: 'A classification of women's work-lifestyle preferences in the 21st century' (Hakim:2000:6).

investment in one's own human capital that the market will reward (Dex:1985:117). So the sexual division of domestic labour leads some women to specialise in domestic work and economise in the effort put into paid employment: they invest less in their 'human capital'. Becker (1981) claimed that it was rational for men to invest more in their human capital as they had no other claims, for example domestic ones, on their efforts. Furthermore, the unstated assumption among sociologists has been that job segregation is *imposed* on women, unfairly and against their will, whereas economists regard job choices as reflecting personal preferences (Hakim:1991:102). Hakim's 'uncommitted' women thus make a rational decision to take up part-time work when choosing to prioritise domestic life (Crompton:1997:17).

Central to Catherine Hakim's argument is the concept of individual choice explaining the nature and pattern of women's employment, and that the heterogeneity of women's employment statuses reflects the heterogeneity of women's choices (Crompton:1997:18). She is critical of structuralist feminists for treating women as a homogeneous, undifferentiated category:

> 'Theory and research on women's employment seems particularly prone to an over-socialised view of women, or with structural factors so heavily weighted that choice flies out of the window' (Hakim:1991:114).

So, in what way is women's *commitment* to paid work linked to *choice* in achieving a satisfactory work-life balance? Proponents of individualist explanations argue that 'most working women with families want jobs with no worries and responsibilities' and suggest that the 'gap in work commitment between men and women is substantial' (Becker cited in Hakim:1991:105,107). Hakim regards the argument that women workers are as committed, hard-working and productive as men as one of the '*Five feminist myths about women's employment*' (1995). She argues, particularly in relation to part-time workers, that they have weaker commitment to paid work, are less likely to seek training and promotion, and are unwilling to take on responsibilities at work that would compete with their domestic responsibilities. She suggests that 'uncommitted' women *choose* to prioritise their familial role over their role in paid work. This argument has been criticised for its differentiation between full-time and part-time workers and for failing to explain how equating commitment with hours worked can be justified.

> 'It is possible to be highly conscious of the needs of one's family and at the same time to care deeply about maintaining employment' (Ginn, Arber *et al*:1996:168).

This argument suggests that women *are* making choices about the way in which they balance the 'two spheres' of their public and private lives and, in many cases, give lower priority to paid work. There are a number of reasons why this might be so including the limited availability of affordable childcare and low-pay, low-status work being an unattractive and uneconomic option.

However, Rosemary Crompton argues that, contrary to Hakim's assertions, feminists who have studied women's employment have been sensitive to the differences not only between men and women, but also between different groups of women (Crompton:1997:21). She argues that Hakim's explanation does not address the problem of disparities in power and resources between men and women in the labour market, whilst acknowledging that women do have choices and preferences. 'Labour market outcomes must be regarded as being shaped by both choice *and* constraint' (Crompton & Saunders 1990 quoted in Crompton op cit). Furthermore, she suggests that the gender division of the labour market is explained by a number of factors, and 'choice' is one of them.

- **Postmodern feminism and heterogeneity**

Heterogeneity and diversity of women and their experiences, both in the workplace and the domestic sphere, are central to other more recent feminist theories such as 'difference' and postmodern feminism. For 'difference' feminists the categories of 'men' and 'women' are relatively unproblematic: the focus is on the difference *between* them. But the deconstruction of these categories and the focus on difference *within* the category of 'women' is 'radically challenging to conventional feminist arguments' (Barrett:1987:28). This sense of difference reflects the diversity of situation and experience *between* women.

> 'Pluralism has emerged as the least threatening solution to the dilemmas posed by the recognition of difference between women. Pluralism has in fact emerged as the lowest common denominator of feminism' (Barrett:1987:32).

Postmodern feminism recognises that the everyday experiences of women are more complex and diverse than one single all-encompassing model can explain. It recognises

the plurality of differences amongst women as a group, as well as the complexity and variety of gender relations, rejecting the universalist view of human action and experience. Elshtain (1987) argues for a move away from 'feminist rhetoric' towards a more objective sociology which seems to be a mixture of traditional liberal pluralism and postmodernist theory, having in common a view of society as fragmented by the diverse experiences of groups and individuals (in Bradley:1989:61).

The gender division of labour, Bradley argues, has a multiplicity of causes and there is no single theory that can explain the complex 'gendering' of society at all levels.

> '...sociologists should no longer aspire to *any* comprehensive and totalising theory of society; no single model which explains each and every aspect of social life can be constructed. The challenge posed by postmodern theory...is one of the most significant challenges that feminism has made to the more rigid forms of Marxist structuralism' (Bradley:1989:23).

Any explanation of 'women's work' is inevitably complex, and capitalism and patriarchy (structural explanations), human capital theory and individual choice (individualist explanations) and more recent postmodern feminist theories can all be regarded as significant elements of that explanation.

PART 2: THE INTERACTION OF CONSTRAINT AND CHOICE IN WOMEN'S EMPLOYMENT

So what is the nature and pattern of women's paid employment? How do constraints and choices interact? And what 'push' and 'pull' factors are relevant in decisions that women make about their work/life balance? Although the majority of the literature in this area refers to 'women', I would argue that many of the constraints and choices of women and work are more directly connected with 'mothers.' It is motherhood, and the care of children, that turns the 'double burden' into a 'triple burden' that specifically makes the plight of women different from that of men. Women who are not mothers are able to enter the labour market on more similar terms to their male colleagues.

- **'Push' and 'pull' factors**

The gender composition of the workforce changed significantly during the 20th century: the number of economically active men decreased whilst the number of women in paid work increased. Participation by men declined partly because the time spent in education and training was extended among younger groups, and the rate of voluntary and involuntary early retirement increased among those over 50. Men born near the end of the twentieth century can expect a working lifetime at least a decade shorter than those born at the beginning (Hewitt:1993:10).[5] The opposite is the case for today's young women who can expect to add a decade of paid employment to their working lifetimes compared with women born early in the twentieth century (Ibid:14). The increase in numbers of women in paid employment during the last century was mainly among married women (Crompton:1997:25). Social constraints regarding married women and mothers 'going out to work' eased from the 1950s onwards, particularly with regard to motherhood. Amongst women whose first child was born in the early 1950s, it was five years before a quarter of them had returned to work and nearly ten before half had done so.[6] By the late 1970s, a quarter of women had returned to work after one year, and a half within five. However the actual nature of the constraints on the successful combination of women's 'two roles' remained relatively unchanged.

Almost all the increase of women's employment from the 1950s to 1980s was in the part-time sector. 'Less full time, more part time' is a key factor in the pattern of women's work (Hewitt:1993:11) and has been central to the debate regarding theoretical explanations. Whilst some feminists have suggested that expansion of part-time work represents a kind of compromise between capitalist employers and domestic patriarchs (Walby 1996), others argue that women have demanded part-time work to fit in with domestic responsibilities and employers have responded to that demand (Hakim 1996). There are, of course, advantages to employers, not only in lower pay but also in other aspects such as National Insurance contributions, pension rights and sick pay. These have, to some extent, been

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[5] Recent debates about retirement and pensions may ultimately result in the raising of the retirement age (see Chapter 2).

[6] The 'Bowlby' years, when it was widely believed that almost any separation from the mother would damage the child' (Hewitt:1993:12).

ameliorated by recent legislation granting greater rights to part-time workers, such as the obligation of employers to set up stakeholder pension schemes and improved paid holiday entitlement. However, these may serve to make part-time workers, especially women, less attractive to employers (Glover & Arber:1995:177).[7]

The 'push' and 'pull' pattern is a complex one and, although the number of women in paid employment is almost equal to men, the pattern of participation is very different. Whereas the typical male pattern of work is one of continuous employment, women's (mothers'?) paid employment is usually discontinuous with one or more breaks from paid work as a result of childcare responsibilities. Many men follow the education/work/retirement route whereas women often display a bimodal pattern of employment – a 'family formation phase' (Dex:1985) in which the 'pull' is towards the domestic sphere, and a 'final work phase' when the 'pull' is towards the fulfilment and independence that a return to paid work can offer.[8] Women have a diverse range of employment profiles including brief or extended career breaks and returning to work between children, but

> '...the number of women who work *continuously* throughout their working lives (only taking out six months' maternity leave before returning to full-time work) remains a very small minority' (Coyle & Skinner:1988:3).

However the nature of work for both men and women has changed significantly in recent decades. There has been a decline in the number of full-time, permanent, secure jobs and an increase in the proportion of those in 'non-standard' work such as part-time, self-employment and short-term contracts. And, of course, term-time employment has been the preferred option for many working mothers either because of a lack of suitable childcare or because of a desire to spend school holiday time with their children.

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[7] More recently, paid paternity leave has been introduced, though this is currently only for a maximum of two weeks around the birth or adoption of a baby.

[8] Although it is widely acknowledged that this pattern persists, evidence suggests that the 'family formation phase' is now later in the life-course (Crompton:1997:28).

- **'Women's work' and occupational segregation**

The expansion of the 'non-standard' employment sector was deliberate government political and economic policy during the 1980s aimed at creating a deregulated, more flexible labour market, but it was also due to the demand for part-time work by women (Crompton:1997:30). There was a huge growth in service industry and 'caring' jobs.

> 'Women tend to predominate in 'caring' occupations such as looking after old people and children, in 'domestic' jobs such as cleaning, in unskilled manual and lower-level clerical work, in the 'lower' professions (such as teaching and nursing) rather than the higher, and in occupations supporting management rather than higher-level or corporate management' (Crompton:1997:44).

Much of this part-time work has been socially constructed as 'women's work' and is paid accordingly: 'there is nothing *inherent* in the nature of particular jobs that makes them full-time or part-time. They have been constructed as such, and such constructions are closely related to gender' (Beechey & Perkins:1987 quoted in Crompton:1997:33).[9] The problem here is that, whilst many women have a 'preference' for part-time work, they are constrained in the sense that it is usually low-paid, low status work that is segregated from men's work and tends to be 'systematically undervalued and marginalized' (Coyle & Skinner:1988:1). Other constraints, such as the limited supply of affordable childcare, that effectively work as 'push' factors from paid work, serve to limit the realistic choices available to many, especially part-time, working women.

Occupational segregation, in which women are concentrated in certain types of work, is a key issue in the pattern of women's work. Women make up the bulk of a highly marginalized *peripheral* workforce, whilst a smaller *core* workforce of highly paid, skilled professionals will remain predominantly male (Coyle & Skinner:Op Cit:8). Hakim argues that the reason for this lies in some women's lack of commitment to work:

[9] The Women and Work Commission Report '*Shaping a Fairer Future*' (2006) indicated that women are tending to enter part-time, low-paid work in the '5 Cs' – caring, clerical, cleaning, cashiering and catering – and that these jobs are often far below their abilities. The Commission found that the gender pay gap was worse in the UK than anywhere in Europe.

> 'The unique values and needs of women workers who are not career motivated...are more easily met by jobs in the peripheral sector, which do not demand the full-time lifelong work commitment valued, and rewarded, in the core sector of the economy' (Hakim:1991:108).

Bradley, however, refers to this as 'segmentation', a process by which different characteristics have been attributed to men and women leading to a gendered assignment of social roles and tasks (Bradley:1999:28). However, she argues that exclusion and marginalisation of women from better jobs is currently becoming unstable, suggesting that a 'genderquake' is taking place in which women are using the 'qualifications lever' to get into professional and managerial jobs (Ibid). There have, indeed, been important changes during the past twenty years. Increasing numbers of women have sought to gain qualifications and undertake long-term professional training in order to gain entry to this type of work. Women comprise the 'slight majority' of medical students and a growing proportion of the legal and accountancy professions (Crompton:1997:46). It should also be noted that, during this time, a growing number of men have entered service occupations such as catering and nursing.

- **The polarising effect of class, age and employment status**

The diversity of women's employment experiences, confirming Barrett's concept of 'difference', is manifested in increased polarising tendencies between working women in terms of class, age and employment status.

Firstly, there is a class dynamic whereby some women are in a position to maximise their human capital, whilst their 'less privileged sisters' continue to be concentrated in the type of part-time work identified with horizontal occupational segregation (Bradley:1998:216). The increase, over recent decades, in the number of women entering well-paid professional and managerial jobs has resulted in a new pattern of widening differentials between workers of the *same* sex, with income distribution for women resembling more closely that for men (McDowell:1991:411). Furthermore, women in classes I and II are more likely to return to work full-time after maternity leave and there is evidence of a divide between a relatively small but growing group of mothers with considerable educational and occupational capital and a much larger group of mothers without such capital (McRae cited

in Glover & Arber:1995:166). Those in the former group are likely to experience a 'pull' back towards their well paid work, and are able to afford good childcare, whilst the latter group are 'pulled' towards continuing domesticity by the prospect of low pay and unaffordable childcare. In many cases, returning to work entails a move down in occupational status. This downward mobility is frequently the experience of women returning to the teaching profession, where it may be necessary to take a job on a lower pay scale on returning from a career break.

Secondly, it has been argued that there is growing polarisation between younger and older women. Younger women are demonstrating a greater commitment to career development in the expectation that much of their lives will be spent in the labour force, and have less orientation towards the domestic sphere than their older counterparts (Walby:1997). However, there are also many older women who gain significant personal enjoyment and fulfilment from the social aspects of the working environment.

Thirdly, it has been suggested that there is polarisation between full-time and part-time working women (Bradley:1998). Full-time work for women is 'astonishingly strongly class differentiated' for whereas 65% of women in professional and managerial occupations work full-time, only 6% of women in unskilled jobs do so opening up a 'significant gap' between women in their life chances (McDowell:2001:450-1). As already discussed, Catherine Hakim identified division between women who follow careers (more likely to work full-time and prioritise work) and 'family-oriented' women (more likely to work part-time and prioritise family life). Family orientation and the caring role of women will be explored in more detail in the next section of this chapter.

Occupational segregation, however, is not only horizontal (in different types of work), but also vertical in terms of the hierarchical structure of employment and opportunities for promotion. Where women work in the same jobs alongside men, their chances of promotion and reaching the higher paid, higher status jobs are less than their male counterparts.[10] This is particularly relevant given the greater numbers of women in professional and managerial jobs already discussed, and is a key issue in relation to women's equality in the workplace. Equal opportunities legislation has undoubtedly

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10 The teaching profession provides a good example of this and will be explored in greater depth in Part 4 of this chapter.

assisted women in gaining entry to professional and managerial careers. Hakim suggests that there has been an 'equal opportunities revolution' giving women equal access to the labour market (Hakim:2000), but *which* labour market?

> 'Women in senior grades have invested in qualifications, work continuously and full-time, are as ambitious and determined as men, are concentrated in integrated or male-dominated occupations and have high earnings' (Hakim:1996:208).

This 'committed' group of women is able to minimise the effect of motherhood on employment patterns: 'occupational class is a key factor in influencing the employment experience of mothers' (Glover & Arber:1995:177), and the chances of mothers with higher education qualifications being in full-time paid work are considerably greater than those with none, demonstrating the growing importance of human capital in mediating women's employment experiences. Furthermore employers are more likely to offer career break schemes to women in professional and managerial positions than to women in manual occupations (Ibid:174).

There are also debates regarding men and their choices, or lack of them. The traditional male stereotype is that work is a 'central life interest'. However,

> '...it now looks as if more men are demoting work in their priorities, agreeing with more women that paid work should only be one aspect of one's life' (Dex:1985:43).

In the last two decades, significant changes have been made in response to men's demands, and legislation is now in place granting rights and benefits associated, for example, with paternity. Hakim argues that most men have little choice, being 'forced' into full-time life-long continuous employment with limited alternative options (Hakim:1996:204). If the alternative is being restricted to the domestic sphere, 'most' men clearly prefer being 'forced' to work: there are still precious few full-time househusbands.

PART 3: THE DOMESTIC CONTEXT: SOCIALISATION, CARING AND THE 'FAMILY'

The institutional structuring of the welfare state was based on the male breadwinner model: men were incorporated into the welfare state as individual citizens, whilst women were regarded as members of families, as wives and mothers. The national insurance system was designed to protect people who would be in full-time employment throughout their working lives – in other words, men and single women. It was not intended to accommodate women whose family responsibilities would interrupt their employment. The philosophy of the Beveridge Report did not exclude women from the labour market, but it assumed 'as a matter of cultural fact' that most women who were financially able to do so would opt for maternity and domesticity (Harris:1997:495): it was an economic fact that seven out of every eight women were dependent on men and 'made marriage their sole occupation' (op cit:395). Feminists and women's groups were divided as to whether women should seek equality with men, or special state protection in recognition of the uniquely different roles – not as competitors in the labour market, but as mothers, housewives and carers. Beveridge himself was particularly concerned with enhancing the role of wives and mothers, who would bear and bring up the next generation, as 'contributors in kind if not in cash' (quoted in Harris:1997:392). Women were, then, dependants and as Beveridge wrote:

> '...the great majority of married women must be regarded as occupied on work which is vital though unpaid, without which their husbands could not do their paid work, and without which the nation could not continue' (quoted in Crompton:1999:12).

Despite there being dynamic and unresolved tensions over social security and gender – between the roles of women as citizens and workers, and women as mothers and carers – the changing economic and social role of women seems to have been unanticipated. Many of the women who entered paid employment at that time, went into 'caring' and 'domestic' jobs created in the welfare state. In the traditional male breadwinner model there was no division of domestic labour: women did the work in the home. As more women have participated in paid work outside the home, a more complex pattern of domestic labour has evolved. Nevertheless, the concept of domestic work as 'women's work' has persisted.

- **The socialisation process**

The socialisation process starts early in life. In terms of the education of girls, the ideology of both the 1959 Crowther Report and 1963 Newsom Reports focused on the need for 'feminine' skills most useful in the domestic context for which, it was assumed, girls were destined.

> 'From primary school and right through secondary education it is the subtle pressures of attitudes, teacher expectations, streaming and motivation which converge to maintain the status quo' (Pollert:1981:92).

In '*Girls, Wives, Factory Lives*' Anna Pollert described the way in which girls, particularly working class girls, came to see marriage and family as their 'career'. Her focus was on the way in which the experience of school and the education system was a key site for skill and value formation in which 'crucial' doors were opened and closed to the future and the process of class and sexual inequality sealed (Op Cit:91).

> 'Like a self-fulfilling prophesy, the various 'labels' that children fall under, like female, working class and black, the particular school they attend, and the streams to which they are allocated all channel them in certain directions, often downwards towards low-level jobs' (Sharpe:1976:141)

This socialisation process in which future aspirations and expectations evolve was reinforced by an education system that compartmentalised boys and girls and offered a gender-based curriculum.

Choices made both at school and on leaving are influenced by myriad factors both individual and structural. On an individual level, each girl has her own particular blend of characteristics, including age, class and race, all of which 'shape and constrain channels of recruitment and promotion, and thereby influence 'choice'' (Rees:1992:46). Furthermore, a woman's own 'cultural capital', her knowledge about the local labour market and training provision, her existing and predicted domestic responsibilities and her qualifications and aspirations, are all important. But of all determining factors,

> '...it is clear that gender, class and race significantly affect what option and career choices boys and girls think are appropriate, and that this knowledge informs their decisions' (Rees:1992:46)

Socialisation in childhood and adolescence magnifies and enhances psychological and personality differences to create the discrete qualitative differences observed between adult men and women (Goldberg:1993:106). Males are more predisposed towards ambitious competitive behaviour than females: 'men never need to be encouraged to apply for promotion' (Hakim:1996:8).[11] In a study by Crompton & Harris (1999) it was concluded that socialisation played a part in the 'success' of social capital 'maximizers' in terms of childhood experiences, particularly parental encouragement. Their findings suggest that the heterogeneity of women's approaches to employment and family life is not a reflection of innate characteristics but is deeply rooted in early patterns of socialisation (Crompton & Harris:1999:145). For many feminists,

> 'socialisation is the means by which little girls and little boys become stereotypically feminine and masculine entities. The result is the sexual division of labour within the family reproduced in the next generation and so within society generally' (Stanley & Wise:1993:107).

More recently, Chevalier (2003) found what he described as 'conservative attitudes' towards childcare responsibilities, amongst both men and women, as contributing to the gender pay gap in a survey of recent graduates. He not only found that two-thirds of these young women expected to take career breaks for children, but also that more than one-third of their male contemporaries expected their partner to 'sacrifice' her career for childrearing responsibilities. Furthermore he found that whereas over 50% of women prioritised being employed in a 'socially useful' job, only 32% of their male colleagues considered this in their employment choices, suggesting a connection with the 'feminisation' of jobs such as teaching and nursing.[12] These findings would seem to confirm that socialisation into traditionally female roles and stereotypes is still relevant in current discussions of women and work, and that recent women graduates may be making a choice in entering lower paid, but socially useful careers.

The recent Women and Work Commission report *'Shaping a Fairer Future'* (2006) found that despite evidence that girls are performing well at school, their talent is often wasted in the workplace. Women are not only paid less for doing the same job as men, but also enter less well-paid jobs because the education system fails to alert schoolgirls to the fact

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11 The issue of gender and promotion in the teaching profession is discussed in more detail in Chapter 3, Part 3.

12 The 'feminisation of the teaching profession' is the subject of Part 1 of Chapter 3.

that their choices will determine what they earn. Many girls resort to choosing between the '5 Cs' – catering, cleaning, cashiering, caring and clerical work – all of which are low-paid jobs that can be done part-time. The Report recommends that girls should be encouraged to think about non-traditional jobs as well as apprenticeships, especially in sectors with skill shortages, and that there should be better careers advice as well as the promotion of quality part-time work. The Commission's findings suggest that the socialisation process that restricts women's opportunities in the world of work is still in existence, despite their significantly improved educational performance and qualifications.

- **The domestic division of labour**

In the early 1970s sociologists studying the domestic division of labour forecast the emergence of the 'symmetrical family' in which society would move from '(a) one demanding job for the wife (ie in the home) and one for the husband (ie in paid work) through (b) two demanding jobs for the wife and one for the husband, to (c) two demanding jobs for the wife and two for the husband' (Young and Wilmott quoted in Hewitt:1993:52). Although economic restructuring during the 1980s resulted in more male unemployment, it did not result in an increase in male participation in domestic chores. Studies have shown that men who felt that they had lost their masculinity along with their job avoided what they saw as 'feminine' domestic work (Morris 1990 in Crompton:1997:84). Rosemary Crompton argues that the domestic division of labour depends crucially on whether a woman works part-time or full-time, and that the division is the same for part-time women as for those who don't participate in paid work at all so that part-time women carry the 'dual burden' of paid and domestic work. Becker (1981) argues that 'women are becoming less specialized in household activities, and men are spending more time at household activities (p24), but Hochschild (1990) suggested a 'stalled' gender revolution in which women have gone to work, but the workplace, the culture, and most of all, the men have not adjusted themselves to the new reality (in Crompton op cit:87).

There are several different aspects within women's domestic role. Ann Oakley wrote about the experience of housework (1974), motherhood and childbearing (1979) in a way that showed these activities to be work in the same sense as any paid occupations, and that many of the experiences of working are common across all types of work. For example in

her housework study, she looks at 'work conditions', monotony, fragmentation, social interaction and isolation at work and working hours, suggesting that there are more common aspects to the wage/unwaged work divide than differences (in Dex:1985:87). However, Catherine Hakim is critical of full-time housewives, arguing that they

> '...make their own misery: their long hours include a substantial volume of unnecessary make-work. As an occupation, the job of housewife is hard to beat: short hours, reasonable security of tenure and average rewards in terms of status and income. It may be boring, but so are most jobs' (Hakim:1996:204).

She asserts that the family division of labour is changing to what she calls a '*modern* family division of labour' (Ibid:206) which allows the modern housewife to engage in employment that is subordinate to domestic responsibilities, often in a part-time job that is less demanding than her husband's.

Sue Sharpe (1994) argued that 'the restraining parameters of girls' and women's domestic and working lives have changed little in the last two decades, or they have merely been redrawn a little differently' (Sharpe:1994:301).[13] She suggests that the idea of 'new man' has been more or less dismissed as 'rather a joke', and that the reality is that few men share the responsibility for home and family. In this scenario, young women look forward to a future of juggling work and domestic life like their mothers before them.

- **Women, caring and the family**

> 'As more women go 'out to work'...caring work is becoming increasingly 'marketized' – that is, carried out for money rather than because of love, duty or social obligation' (Crompton:1997:81).

As we have already seen, for many women going 'out to work', that work is 'women's work' similar to the work they carry out in the home. Human action has to be explained and understood in relation to norms and values as well as individual self-maximisation: 'The assumption that women should take the major responsibility for care and nurturing, particularly of children, is a very powerful normative assumption' (Crompton & Harris:1999:145). Some feminists make a strong argument regarding the caring role

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[13] Sharpe wrote the second updated edition of 'Just like a girl' two decades after the first, returning to the same four London schools to look at a new generation of girls and to examine how attitudes and expectations had changed.

undertaken by women being connected to guilt and an imposed set of beliefs in which caring is not so much a matter of choice but of obligation (Finch & Groves:1983:6). Marxist feminists have argued that the 'social and spatial separation of production (doing in the workplace) from reproduction (caring in the home)' is connected to the rise of capitalism and its categories of 'breadwinner' and 'dependants' (Graham:1983:23). The focus here is on caring and dependency as a political and economic relation supported by the wider system of gender divisions (Ibid:29). However, others argue that far-reaching changes in personal relationships and family life and the way in which lifestyles are now less dependent on convention and tradition, have meant that individual choices and preferences have become more important in determining them (Crompton:1999:17).

Yet none of these perspectives can fully explain why divisions between the public and private spheres of work coincide with those of gender. There is, undoubtedly, a powerful ideology of women's 'place' as internalised by themselves, their husbands/partners and their dependants (Ungerson:1983:35) – plus the socialisation process that is engendered within an enduring stereotype of what it is to be female. The concept of 'community care' of the elderly that (re)emerged during the 1980s depends to a great extent on women being ready, willing and avail/able to provide such care. Alan Walker has argued that both women and elderly people (the majority of whom are themselves women) share a dependent status, which is determined in large measure by the patriarchal state (Walker:1983:106). However, over the past two decades, government policies with regard to taxation have become more family friendly, with more allowances and assistance for people caring in their own home, be they male or female. The 'pull' towards the domestic sphere and away from paid employment can be a powerful one, whether motivated by some biological aspect of being female or by socialised guilt, whether through 'choice' or perceived necessity. Whatever the reason, many women do indeed move from full-time to part-time employment, or out of the labour market altogether in order to undertake a caring role.[14]

Over recent decades, the structure and nature of 'the family' have changed significantly and there is evidence of growing social inequality and polarisation premised on the family

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[14] Chapter 2 explores the significance of women's work patterns, including caring, career breaks and low-paid part-time work, and the way in which they constitute a key problem area for governments in connection with pension provision.

and domestic context as well as has already been demonstrated in the context of paid work. For example, whereas single mothers are the group of women *least* likely to be in paid employment (and families where no-one works), women with higher qualifications are *most* likely to work and, in addition, are likely to enter partnerships with similar men thus underlining the polarity between work-rich and work-poor households (Crompton:1997:82). Furthermore, there are significant differences in the ways in which women balance their family and working lives, and the reasons for that balance, leading to diversity of outcomes even amongst professional and managerial women. Studies have concluded that 'managerial' women are more likely to refuse to compromise and seek to maximise their goals in respect of both employment careers and family lives, whereas 'professional' women, particularly in the medical profession, tend to 'satisfice,' a process involving the conscious scaling-down of employment and/or family goals in order to achieve their preferred combination (Crompton & Harris:1999:136-7).

Even when women overcome vertical and occupational segregation and are successful in the traditionally male-dominated job sector, they are still constrained by employment or family factors that affect the choices they are able or willing to make. Gender stereotyping in education is a complex process and intersects with the impact of race and class in determining career 'choices'. However, the notion of choice is a false one, because for so many girls those choices are constrained from the outset not simply by their own constructions of their future family role but also by 'the manifestations of class and patriarchal relations in the structure of...labour-market opportunities' as well as the influence of parents, teachers and peers (Rees:1992:58). Achieving the balance between employment and domestic spheres is inevitably problematic for most women. Part 4 explores how this balance, together with constraints and choices, works for women teachers.

PART 4: COMBINING 'TWO SPHERES': IS TEACHING IDEAL WOMEN'S WORK?

> 'There are jobs which are so easy to combine with marriage and motherhood that, metaphorically speaking, a woman can practice them almost with one hand at the cradle. Teaching, for instance, particularly in nursery and primary grades, seems next to ideal...' (Myrdal & Klein:1956:156).

Prior to the 1944 Education Act, women were officially barred from teaching upon marriage[15] so it was usually not possible to combine the two separate spheres of employment in teaching and domesticity. In arguing that teaching was the 'ideal' work for wives and mothers, Myrdal and Klein were emphasising the predominant view of the post-war era that women should prioritise their domestic responsibilities over paid work. Many women entered the teaching profession because it was recommended as a career in which a fulfilling combination of work and family life could be achieved: thus these women were socialised into the idea of combining these two spheres. Perhaps 'combining' was not really an appropriate term given the fact that their work in the public and private spheres was largely kept quite separate so that, in effect, they alternated between the two. Nowadays, as my interviews show, teachers' work impinges and encroaches upon their private lives to a greater degree than was previously the case, thereby making the achievement of a satisfactory 'combination' and balance more problematic, particularly in terms of keeping the two spheres separate.

Teaching was, and arguably still is, regarded as 'women's work' particularly in the primary sector - as a caring, feminine profession in which women's natural, biological characteristics were appropriate.[16] The care of children's education was seen as a female duty.

> 'Part of bringing up children successfully and equipping them for adulthood is to teach them the form of behaviour, knowledge and skills which will be necessary in their various future social roles; teaching, then, becomes inseparable from socialisation' (Bradley:1989:204).

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15 The Marriage Bar was, though, never fully implemented so some women did marry and remain in teaching.

16 The 'feminisation of teaching', and the role of women in primary teaching, are discussed in Chapter 3, Part 1.

There was little horizontal segregation in the profession, which welcomed women equally alongside men, but vertical segregation was, and remains, an important feature of the teaching profession.[17]

During the 19th and early 20th centuries, despite an overwhelming majority of teachers being women, they were concentrated in the elementary sector. Men, in contrast, made up the majority of university lecturers and professors. This was connected to a perception of teaching as an extension of motherhood whereby women were seen as best suited to the teaching and care of younger children. Men were regarded as being more suited to teaching older children, particularly boys, for whom they provided an authoritarian father figure, socialising them into masculine roles in adulthood. Furthermore, men tended to be promoted to headships and positions of greater responsibility thus reproducing the structure of the patriarchal family with the female teacher under the direction of the male administrator (Bradley:1989:207). A pattern of vertical segregation based on sex-typing developed from the outset of state involvement in the provision of education. There were more career opportunities for women with the advent of girls' secondary and higher education but, despite women taking over teaching older children during the wars, teaching echoed the pattern evidenced in women's employment generally with men reasserting their domination of the hierarchy both inter- and post-war.

> 'For the very young children of either sex, women, qua woman, is the best teacher...For the older boys, men, because they are men, are the best teachers, even though women of higher teaching qualifications may be available' (Royal Commission on Equal Pay 1945-6 quoted in Bradley:1989:211).

The post-war 'baby boom' necessitated increased provision for infant education and growing numbers of women entered the profession. As already discussed, teaching was regarded as a 'convenient' career for women and many embarked on teacher training because they had been advised to do so for exactly that reason. This argument tended to focus on the structural fit between home and workplace, of combining them in terms of organisation of work.

> 'The compatibility of teachers' hours of work and holidays with those of their children at school usually is seen as a benefit that attaches to teaching as a job for women (Evetts:1989:93).

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[17] Chapter 3 Part 3 explores the issue of women teachers and promotion.

The socialisation of women as nurturers and caretakers created in women particular notions regarding the appropriate role they should play as teachers, and this association between women teachers and caring is evidenced by persistent maternal analogies found in accounts of teaching young children. But in *Carry on Caring*, Sandra Acker argues that, although a gender analysis is important in understanding teachers' work, it does not mean that teachers' caring activities or workplace cultures are derived from essential qualities of women (Acker:1995).

Yet despite the increase in the numbers of women teachers, particularly in the primary sector, vertical segregation persists, though the most recent statistics for 2004 show an increase in the percentage of female head teachers. They indicate that 84.3% of primary teachers and 64.6% of primary heads are women. In the secondary sector, 55.7% of teachers and 34.1% heads are women (DfES:2006).[18] But the promotional structure remains biased towards men with an uninterrupted service record whereas, perhaps because teaching has been regarded as a 'convenient' profession for combining motherhood and employment, many women leave altogether for motherhood or interrupt their careers for full-time childcare (Bradley:1989:213). Educational leadership is viewed essentially as 'men's work', but a possible explanation of the increase in numbers of female primary heads could be the decline in the number of male teachers entering the profession. In addition, men tend to leave the profession before the age of 30 if they regard their promotion prospects as unfavourable.

Byrne (1978) explained the 'non-promotion' of women as the result of secondary school reorganisation, continuing upheavals, greater organisational complexity, accompanied by rapidly increasing external demands on teachers and the curriculum, together with a reluctance of women to engage in decision-making and conflict all combining to deter women as a group from applying for promotion (in Al-Khalifa:1988:82). Whilst most of these factors are structural and related to changes in the education system, which have accelerated in recent decades, others suggest 'biological' factors and, as Byrne also argued, a preoccupation with marital security, childcare, husbands' careers and a low commitment to teaching as a career (Ibid:81).

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[18] See Appendix 2: 'Full-time qualified teachers and head teachers in service in the maintained schools sector by grade and sex, England' for graphical presentation of recent teacher statistics.

One problem with this explanation is that it treats women as a homogenoous group with uniform characteristics whereas there is considerable diversity amongst women teachers. This diversity is evident both in their domestic lives, and also in whether or not there are constraints associated with balancing these with their career, and the choices they make regarding professional advancement.

> 'The difficulties that many women do encounter in maintaining dual roles, combining the work of family care responsibilities with a full commitment to paid teaching work, a situation which women themselves recognise as demanding and often stressful, is not acknowledged in the assessment of a teacher's worth' (Al-Khalifa:1988:85).

Al-Khalifa argues that a man's marital status and parenting role are ignored, and that the explanation that career breaks account for the lower scale positions of married women cannot be sustained since over half take a break of less than five years (Ibid:83). Regarding promotion, she quotes a female teacher from an NUT survey:

> 'I never cease to be amazed that women are penalised for having children but men are promoted because they have a family to support' (quoted in Al-Khalifa op cit:85)

This suggests that sex discrimination may be a significant factor in explaining promotion and scale differentials between men and women. Rosemary Deem also argues that differences in male and female teachers' achievements are related as much to discrimination and ideological constructions as to any real difference in aptitudes (see Bradley op cit:215). Furthermore, Bradley suggests that

> '...when men enter the female professions they are able to exploit their gender to rise rapidly up the hierarchy to top posts. By contrast, ideologies of altruism, female sacrifice and maternalism make it difficult for women in the professions to mount campaigns which might make their work commensurable with that of male professionals' (Bradley:1989:219).

Despite men and women starting with the same qualifications, women quickly fall behind in the promotion race, even before career breaks. When they do take career breaks, they return at a lower level in which 'human capital' is disregarded (Ibid:64).

Teaching could, then, be regarded as a rewarding and fulfilling career for women that appears to successfully combine family life with a vocational profession. However, recent educational policy changes have increased the workload of teachers in terms of paperwork

and the administrative burden to such an extent that teachers complain of it encroaching into their home and family lives.[19] Vertical segregation of the profession means that such a combination is likely to hamper advancement to the top of the professional hierarchy and career breaks appear to restrict women to lower levels of pay and status. Whilst women teachers strive to achieve a balance in their lives between a number of roles, they frequently find this a source of stress and guilt.

> 'Conditions of employment, ethos of their schools, persistence of sex-role stereotyping, and the reality of the division of work in the home can all contribute to constructing an environment which is insensitive or even antagonistic to the aspirations of women teachers' (Al-Khalifa op cit:88).

There remains a traditional patriarchal sexual division of labour in schools, a division that will tend to perpetuate socialisation of children into traditional male/female stereotypes: vertical segregation may retain its powerful influence over future generations.

CONCLUSION

Gender divisions, both in the workplace and the home, clearly persist. In the workplace, there is much evidence of horizontal, or occupational segregation, and of vertical segregation. In the home, women continue to carry out the bulk of domestic chores and childcare. Together, these sexual divisions of labour serve to constrain women's opportunities for well-paid, higher status work, and cause them difficulties in achieving their work/life balance of choice. There are, today, greater opportunities for women to enter higher status professional and managerial jobs, but problems in breaking through the 'glass ceiling' are explained by elements of all three theoretical approaches discussed.

Patriarchy is still in evidence in some working environments in terms of men preventing women from climbing up the hierarchy, particularly in professional and managerial roles that were once a male preserve. In teaching, not a traditionally 'male' profession, men hold the majority of high status jobs despite being in a numerical minority. Many women are confined to so-called 'female' occupations in which they work part-time, and are frequently 'managed' by men in higher positions. In the home, patriarchy still plays a part, both in

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[19] Gender and promotion are discussed in Chapter 3, Part 3

terms of women continuing to be responsible for most domestic work and in the persistence of social values and norms associated with 'good' motherhood and, arguably, 'good wife/partnerhood'. However, not all women feel oppressed and not all men seek a patriarchal role either in the workplace or the home.

The spirit of individualism engendered since the 1980s encouraged women to consider new options and opportunities that were becoming available to them. Women who wish to pursue a career are more able than in previous generations to gain qualifications through individual merit and effort, attempting to deny the structured inequalities of gender. They can plan and time their family responsibilities to fit with career plans, but career breaks are still liable to hamper their progress to the top. However, as we have seen with teachers, it would seem that for many, their individual choice is to attach significant importance to their domestic and childcare responsibilities. The opportunities for genuine individual choice are considerably reduced for women with less 'human capital', and this group continues to be constrained and restricted to the low pay, low status, part-time work sector that fits with family commitments. These women are rarely able to afford to pay for childcare, and reliance on family or informal care inevitably constrains their options.

The continuing sexual division of labour, then, is less of a problem for some women than for others.

> 'Difference and diversity are now the key features of the female population, with the likelihood of increasing polarisation between...women in the 21st century' (Hakim:1996:215).

But in the postmodern world of diversity and difference, there are winners and losers. Whilst some are able to take advantages of opportunities and make genuine choices about the balance between work and family, others are constrained to a greater degree by structural factors of patriarchy and capitalism and have less 'human capital'. Hakim's 'preference' theory is only really applicable to a fortunate minority, and even then, there are barriers to some genuine preferences. Motherhood is clearly a 'barrier' for many women but however far the development of 'new man' goes, it will not extend to responsibility for child*bearing*, though fathers are involved with childcare and domesticity to a greater degree nowadays than ever before. One solution is for women to have no children and there is evidence to suggest that childless women are less constrained in their career

advancement. But this is not the choice of most women – or men. Perhaps what women really need is two lives, one in which they have a family and one where they do not.

In arriving at decisions regarding different combinations of employment and family and achieving a balance between the two, constraint and choice both play an important part. And this balance is not something static: women's (and men's) choices alter over the life-course, as do the constraints on those choices.

Chapter 1

CHAPTER 2

THE CHANGING CONTEXT OF RETIREMENT: PERSPECTIVES, POLICIES AND PENSIONS

'Retirement has become an arena more fragmented and heterogeneous in its social, economic and physical expression than ever before. The largest point of rupture is itself a complex matter of culture, class, gender and generation.'[1]

INTRODUCTION

PART 1: THE SOCIAL CONSTRUCTION OF RETIREMENT

- Functionalist and structuralist theories of retirement
- The retirement debate
  - A demographic 'time bomb'?
  - The changing paradigm of intergenerational equity
  - Class, cohort and retirement

PART 2: FROM WORK TO RETIREMENT: LABOUR MARKET AND PENSION POLICIES

- The government perspective
  - Older workers and labour market policy
  - Age discrimination in the workplace
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- The individual perspective
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PART 3: WOMEN, TEACHERS AND RETIREMENT

- The gendered context of retirement
- Professional women and pension provision
- Teachers' pensions and the role of their Unions

CONCLUSION

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[1] Gilleard & Higgs: 2000:45

INTRODUCTION

When old age pensions were introduced in 1908, they were welcomed as a means to ending poverty in old age. The Old Age Pensions Bill legislated for a selective, non-contributory pension on reaching the age of 70. Over following decades, rules governing pension contributions and entitlements evolved to form the basis of post-war pensions and social security legislation.[2] The 1946 National Insurance Act, together with the 1948 National Assistance Act were designed to provide pensions, unemployment and sickness insurance and a means-tested 'safety net. Mandatory retirement ages of 65 for men and 60 for women marked the advent of mass 'retirement.'[3]

From the 1950s onwards, occupational pensions became increasingly significant,[4] and the number of people, across all classes and professions, in early retirement began to grow.[5] However, Casey & Laczko (1989) argued that many of the so-called 'early retired' were, in reality, long-term unemployed, either through sickness or redundancy, and that early retirement as a positive life choice was solely a non-manual route out of the labour market. The divide between those receiving only a state pension and those benefiting from both state and occupational pensions led Atkinson & Sutherland (1991) to argue that there were now not only 'two nations in old age' but also 'two nations in early retirement.'[6]

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[2] These included the 1911 National Insurance Act which introduced a contributory pension giving a contractual right to unemployment and medical payments, and the 1925 Widows, Orphans and Old Age Contributory Pensions Act which marked the beginning of pensions to which contributions were made both by employers, employees and the state.

[3] Phillipson suggested three reasons why retirement grew in significance between 1950 and 1980: firstly, there was an increase in the proportion of the population reaching statutory retirement age; secondly, the significance of paid work after retirement decreased; and thirdly, there was an increase in the number of people receiving both state and occupational pensions (Phillipson:1993:183).

[4] In his famous lecture on the 'social division of welfare', Richard Titmuss identified three kinds of welfare: overt transfers of resources in services such as health and education, cash transfers such as supplementary benefits, and occupational welfare, which he described as covert, tax-free transfers of resources to individuals and companies, including company contributions to occupational pensions (Titmuss:1958). Occupational pensions had first been introduced in the late eighteenth century in the Civil Service and in other areas of the public sector in the nineteenth century.

[5] The 1931 and 1961 Census figures reveal that the percentage of retired men aged 65-69 doubled from 30% to 60%, and aged 70+ went up from 63% to 90% (Harper:1989:95).

[6] Although they acknowledge that the 'two nations' idea is an over-simplification, they nevertheless identified 'discrete differences between different sets of circumstances' (Atkinson&Sutherland:1991:35).

Part 1 of this chapter focuses on the social construction of retirement looking, firstly, at theoretical explanations and, secondly, at the 'retirement debate' about demographic change and intergenerational equity. The final section of Part 1 discusses the relationship between social class and retirement and the way in which the growing trend towards earlier retirement and increased life expectancy have transformed 'retired' people from a homogeneous group to a collection of individuals characterised by heterogeneity and diversity.

Part 2 looks at employment and pension policies. The first section considers the government perspective including employment policies for older workers, age discrimination legislation and flexible employment strategies. The second section explores the individual pension perspective, including private and occupational pensions and financial security and risk in retirement.

Part 3 explores the situation of women teachers looking firstly at the retirement position of women in general, then more specifically at teachers, with particular reference to pensions and the role of teachers' unions.

PART 1: THE SOCIAL CONSTRUCTION OF RETIREMENT

- **Functionalist and structuralist theories of retirement**

Research in social gerontology began, in the 1950s and 1960s, to focus on the implications of an ageing population. The causal factors of the 'problems' involved were attributed in part to the impact of compulsory retirement and of industrialisation.

> 'These trends were interpreted within the dominant functionalist perspective. In consequence, old age was essentially viewed as a problem of adult socialisation seen largely in terms of individual adjustment' (Fennell *et al* 1988:43).

The functionalist perspective had two main strands: disengagement and activity theory.

Disengagement theory emphasised the discontinuity between old age in terms of retirement, and earlier life-cycle stages. It was a predominantly psychological approach, 'though references to social components locate it within functionalism in theory and conservatism in political ideology' (Fennell op cit:46). The theory was expounded by Cumming and Henry (1961) in *'Growing Old'* as a 'common-sense theory' in which

> '...ageing is an inevitable mutual withdrawal...resulting in decreased interaction between the ageing person and others in the social system he belongs to' (Cumming & Henry: 1961:13-14).

They suggested that disengagement occurred independent of ill health and poverty and may be initiated by the individual, and that loss of work could potentially lead to demoralisation and loss of self-esteem. But Townsend (1973) argued that there was little evidence of old people taking the initiative in 'disengaging' and plenty to suggest replacement and substitution of lost roles and relationships:

> 'Widowed people remarry or rejoin their married children, or develop more intensive relationships with one or more of their children. They may see more of their neighbours. *Extensive* social interaction may be gradually replaced by *intensive* local interaction, involving many fewer people' (Townsend:1973:230)

Disengagement theory has become harder to defend given the trend towards earlier and longer retirements (Kohli:1988:381). Palmore (1985), analysing US longitudinal data sets, concluded that retirement at normal age resulted in few adverse health effects, little substantial effect on activities and little or no effect on attitudes to retirement (in Phillipson:1993:190).

Activity theory explained the process of ageing from a contrasting perspective, arguing that people tend, from middle age, to find substitutes for previous statuses, roles and activities, by staying active in a variety of ways. Emerson (1959) found that despite initial disorientation at loss of role, psychological problems such as tension and anxiety were resolved after a period of transition (in Phillipson:1993:185). Havighurst (1963) argued that the way to overcome this and achieve a 'successful' old age was by maintaining the activity patterns and values typical of middle age into old age, or by replacing them with new activities as a means of maintaining life satisfaction (Bond *et al*:1988:32). He suggested

that a wide variety of social roles was positively related to happiness and good social adjustment in old age. The main critiques of this approach focused on its idealistic nature, being unrealistic for all but a minority of older people able to maintain activity levels of middle age.

Structural theory focuses on the way in which old age is socially constructed through the institutions of work and state. 'Structured dependency' theory (Townsend:1981) argued that old age dependency was structured by economic and political forces, particularly through the effects of retirement policies and the existence of widespread poverty and that, through these, the position of the elderly is shaped and changed.[7] Townsend argued, in particular, that retirement and pension status were developments of capitalist and state societies and had created and reinforced the social dependency of the elderly. Furthermore, he criticised the 'acquiescent functionalism' approach as individualistic rather than societal, for asking only how to adjust to the ageing process rather than how and why society restricts life chances and opportunities at older ages (Townsend:1981:5-6).

Alan Walker also adopted a political economy approach to old age in which he suggested that the main determining factor on quality of later life is lower social and economic status prior to retirement, and the relatively low level of social benefits (Walker:1981b:88). He was critical of conventional gerontology that had tended to treat the elderly as a homogeneous group, and described the effect of social class on structured dependency as 'the social division of life chances.' People who have no choice about being retired compulsorily, or are forced to give up work because of ill health or disability, are more likely to be dependent on a state pension and benefits:

> 'Different cohorts of adults come to retirement with differentially distributed access to resources and therefore with different opportunities and post-retirement life chances' (Walker:1981b:76)

Walker (1996) drew attention to the 'social creation' of dependency and the relationship between different age groups, and between ageing and economic life.[8]

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7 Townsend also drew attention to the negative effects of residential care and of the tendency of community care policies to create what he called 'grateful and passive recipients' (1981:22).

8 '*The New Generational Contract*' (Walker:1996) is discussed in 'The changing paradigm of intergenerational equity, the second part of the following section.

The argument that the elderly, having retired from gainful employment, become *more* dependent was criticised by Kohli for ignoring the fact that those who receive low pensions are typically the same people who have experienced 'precarious and low-paid employment careers' (Kohli:1988:377) and he argued that, for them, retirement might offer greater income security and less dependency on a low-wage labour market. Paul Johnson also regarded labour force participation as constituting, for some, greater dependency than receipt of an old age pension (Johnson:1987:10). He believed that the retired were characterised more by heterogeneity than homogeneity given the wide variation in financial status by age, class and gender, and argued that elderly people, as a whole, probably had more secure incomes and had become less marginalised as consumers than earlier in the twentieth century (Johnson:1987:14).

- **The retirement debate**

Demographic change over recent decades, including declining fertility and increasing longevity, has the potential to influence many aspects of our personal, social, financial and political lives. In the context of the trend towards early exit from the labour force, this has given rise to 'demographic time-bomb' projections. 'The retirement debate' is divided into two parts: the first discusses recent demographic trends and the second looks at the changing paradigm of intergenerational equity.

- **A demographic 'time bomb'?**

During the post-war period, particularly from 1945-1960, concern began to grow regarding the likely consequences of an ageing population: it was increasingly regarded as a potentially serious political, social and economic problem. As already discussed, the focus of social gerontology at that time was on the problems and difficulties associated with ageing, of the elderly as a 'burden' and the 'dangers' of a growing number of economically inactive people. Two main demographic themes emerged during the second half of the

twentieth century: firstly, the growing proportion of the population aged 60/65 and older,[9] and secondly, the growing proportion of the population, especially men, who were no longer economically active.

There are two aspects to the first theme of population ageing. One is connected to an increased life expectancy, with more people living to an older age and, consequently, an increase in the proportion of older people, particularly the 'old-old' aged over 80. The other aspect is falling birth rates and a combination of the two, could lead to a near doubling in the percentage of the population aged over 65 between now and 2050.[10]

The second theme of the growing economically inactive population concerns a growth in the number of people who are retired and, more importantly, early retired. The 'baby boom' delayed the effect of underlying long-term trends, but will now produce thirty years of very rapid increase in the so-called 'dependency ratio' (Pensions Commission:2005).[11] The 'old age dependency ratio' has been used by the Pensions Commission to emphasise the effect of demographic change, exacerbated by the 'baby boom', on the balance between the working age population and those who are over retirement age. It should be noted, however, that this 'dependency ratio' makes no allowance for the number of people below retirement age who are not working and may, therefore, be 'dependent', or for those over retirement age who are working, or have other forms of income, and may, therefore, not be dependent.

In *'The Imaginary Time Bomb: Why an Ageing Population is not a Social Problem'*, Mullan (2000) argues that greater longevity and falling infant mortality should be causes for celebration rather than concern. He suggests that none of the social problems generated by a growing proportion of older people is insurmountable and that alarmist perspectives could be potentially damaging not only for older people but also for society as a whole. He argues that assumptions of a demographic time bomb have been used to legitimise an anti-welfarist agenda focused on pensions and the provision of healthcare services. Mullan challenges the time bomb theory by arguing that these two areas of the welfare

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9 The ages of state pension entitlement for women and men.

10 The 'baby boom' has meant rapid increases and decreases, up to 30% in ten years, of cohort size of births who then need medical care, education, employment and, ultimately, pensions (Coleman:2000:80).

11 See Appendix 3: 'The evolution of the old-age dependency ratio, 1953-2053, GB' taken from the Pensions Commission Report (2005). The Pensions Commission was set up to report on potential solutions to the 'pensions crisis.'

state were established after the Second World War when the population was ageing faster than it is today and that, assuming continued economic growth, the British economy would be able to cope with the ageing projections currently being made for the twenty-first century (Mullan:2000:145-7).[12]

In considering the effects of an ageing society as a 'burden or benefit', Pat Thane argues that

> '...the age structure of the population is by no means the only or the major determinant of the 'dependency ratio.' Labour market trends are more important. Lower rates of unemployment could go far to offset the effects of the ageing of the population...The concept of dependency should be used with great caution in this context' (Thane:2000:483)

There is now a renewed emphasis, in government policy, on ameliorating the effects of demographic change on the 'dependency ratio' by encouraging greater individual responsibility for financial provision in retirement, and on making more gradual and flexible retirement possible, thereby retaining older, experienced people in the workforce.[13]

- **The changing paradigm of intergenerational equity**

Closely linked with demographic change is the notion of intergenerational conflict as a possible outcome of inequitable gains and losses under the welfare state between different generations. Changes over time in the relative sizes of cohorts or generations relying on different aspects of intergenerational transfers are particularly important; that is, instant transfers of money, through the tax system, 'from younger earners to older spenders' (Coleman:2000:80). Demographic change alters the ratio between working and non-working populations, and because National Insurance has never operated on an actuarial basis, contributions are paid out to current recipients on a 'pay as you go' basis

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[12] John Vincent described Mullan's book as 'a clear, direct and polemical challenge to the popular perceptions of the issue' (Review in Ageing & Society, 20, 2000, p797).

[13] Government policies on age discrimination and flexible retirement are discussed in greater detail in Part 2 of this chapter. See also Department for Work and Pensions (2002) and Pensions Commission (2004, 2005) for recent initiatives towards transferring the burden of financial provision in retirement on to the individual citizen with greater emphasis on individual responsibility.

(Deacon:1995:83). This issue re-emerged during the 1980s[14] when 'New Right' monetarist policies aimed to 'roll back the state' and encourage individualism. Workers were reassessing how much of their taxes should be paid towards supporting pensions for retired people which undermined attempts to restrict public expenditure and reduce levels of taxation (Laczko & Phillipson:1991:103). The debate also extended to the funding of public sector pensions, including teachers' pensions, by private sector taxpayers.[15] Paul Johnson envisaged an apocalyptic scenario of 'increasingly bitter competition for resources between workers and pensioners' (Johnson *et al:*1989:2). On the effect of the trend towards earlier retirement, he suggested that

> '...an inevitable corollary of this reduction in the number of years spent in employment is an increase in the length of life spent dependent on the effort and output of that section of the population currently engaged in productive work' (Johnson op cit:4).

The debate was not confined to Britain. In France, it was suggested that demographic and retirement trends were a threat to social cohesion 'bound to get worse in years to come' (Gaullier in Laczko & Phillipson:1991:104), and the World Bank published a review of the effect of an ageing population in the pessimistically entitled *'Averting the Old Age Crisis'* (1994). The intergenerational effect of the ageing European population was also recognised at supra-national level by the Commission of the European Communities:[16]

> 'Ageing will affect two critical components of the economy: the labour market and public social welfare expenditure. A substantial degree of solidarity between generations and social integration is needed to cope with problems in these two fields' (quoted in Walker:1996:7).

'The New Generational Contract' (Walker:1996) put forward an economic analysis which challenged the 'welfare generation' concept, concluding that Britain's welfare state had generally been equitable between generations. Hills argued that, for most cohorts, 'aggregate life-time benefits are not very different from aggregate life-time taxes' and that it is difficult to identify a 'born to pay' generation. He suggested that intergenerational equity could continue unless welfare was substantially scaled down (Hills:1996:79). Inevitably,

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[14] High levels of umemployment at the time also led to debates about intergenerational equity in terms of older and younger workers. This issue is discussed in Part 2 of this chapter.

[15] This re-emerged as a subject for debate during 2005 when the issue of raising the state pension retirement age was high on the political agenda. Public sector unions persuaded the government to leave the public sector retirement age at 60 for current members of pension schemes despite objections from the private sector.

political choices have to be made regarding the funding of pensions and the balance between state and private provision through inducements to individuals to save for their old age. Pat Thane disputes the likelihood of intergenerational conflict given the increase in the number of women in the labour market set against the later age at which many young people, following higher education, enter paid work (Thane:2000:483).

The concept of dependency is also challenged by the growing diversity amongst older people, particularly in terms of economic resources, and Walker's argument that 'elderly people and women in particular...are in effect trapped in poverty' (Walker:1987:191) has become more difficult to defend. Bury (1995) criticised the structured dependency approach for its tendency to reinforce negative views of ageing and gender:

> 'The constant reiteration of the links between older people and dependency, poverty, inequality and low status runs the risk of reinforcing negative perceptions...even though the intention is clearly to raise their political profile' (Bury:1995:20)

The reality of the situation of older people today is that not all are dependent on state pensions and social security benefits: many receive income from occupational and private pensions and from savings. The impact of social class and economic circumstances on the experience of retirement and ageing is, as the next section demonstrates, considerable.

- **Class, cohort and retirement**

The increase in the numbers of older people might have afforded opportunities for greater intragenerational solidarity, yet 'precisely the opposite seems to have happened' with the development of a variety of 'cultures of ageing', so that it is meaningless to consider 'older people' as a distinct social group (Gilleard & Higgs:2000:8). The majority of people reaching retirement age are not only wealthier than previous generations but also, in many cases, are wealthier than they were for much of their working lives, enabling them to engage with contemporary 'lifestyle culture' (Op Cit:9).

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16 The European Union declared 1993 'European Year of Older Persons and Solidarity Between the Generations.'

> 'Those now retiring will almost invariably have a telephone, TV and VCR, central heating, automatic washing machine and a fridge-freezer. They will most probably own their own house, have a car and eat out at least occasionally. They are more likely than earlier cohorts of newly retired people to exercise, deliberately eat healthier foods and take short-break holidays...Their previous work history will have involved more job changes, greater upward occupational mobility and increased geographical mobility than any previous cohort had experienced' (Gilleard & Higgs:2000:43).

The heterogeneity of older people developed in tandem with the trend towards earlier retirement, and the growing number of people who were 'retired' but far from 'old.'[17] In 1974, Neugarten noted the rise of the 'young-old', the 55-70 age group whom, she argued, were beginning to challenge the traditional stereotypes of old age. She described them as:

> '...relatively healthy, relatively affluent, relatively free from traditional responsibilities of work and family and...increasingly well educated and politically active' (quoted in Phillipson:1983:47).

There is wide diversity amongst the retired, not only between men and women but also between individuals within those groups. There is also diversity between social classes and ethnic groups, in financial resources, physical fitness, states of health and age. Even after the statutory retirement age, the chronological age of the retired can be anything from 60 to 100+, and in this era of *early* retirement there is an even greater age-span. All these factors influence the degree to which retired people are able to participate (or not) in the kind of retirement portrayed by current, more positive images.[18]

The growth of private pension provision and the more widespread membership of occupational pensions have enabled many retired people to enjoy significantly greater financial security.[19] 'Middle-class retirees...are seen to have the economic and cultural capital to assist the conversion of free time into leisure' whereas working-class retirees have fewer resources with which to consume and participate in leisure pursuits

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17 Pat Thane argued that the heterogeneity of older people was not a new phenomenon: 'Old people have never been a homogeneous group of the poor and dependent...Old age is a phase of life in which the range of experience is greatest; that range has expanded in the course of the twentieth century' (Thane:2000:8).

18 A contrasting image has been portrayed on television in recent years, that of the grumpy old man. For example, programmes such as *'One Foot in the Grave'* and *'Last of the Summer Wine'*. During 2004 there was a television series entitled *'Grumpy Old Men'* in which 'older' men complained about new technology, current popular cultural trends: *Grumpy Old Women* appeared in 2005.

19 The number of people contributing to private pensions rose significantly, with the aid of tax incentives, from the 1980s onwards. The policy was part of the New Right's encouragement of individual responsibility. See Part 2 of this chapter – 'From collectivism to individualism: The New Right and pensions.'

(Fennell:1988:93).[20] Retirement has, increasingly, come to be regarded as a time for leisure and opportunity:

> 'Earlier retirement is leading to a re-evaluation of the balance between work and leisure with greater emphasis on constructing a lifestyle which either combines elements of paid work with longer periods of leisure, or which focuses exclusively on recreational activities' (Fennell:1988:173).

The sociological evidence of growth in the leisure industries associated with older people is considerable, for example, with 'specialist magazines, holiday companies, the second home industry, retirement communities, private sheltered housing schemes' (Fennell:1988:96). At one time, there were few older adults in evidence in popular advertising and businesses focussed their product development and marketing efforts on the young. More recently, the retailing world has begun to identify older people as potentially valuable consumers, so their marketing campaigns are replete with images of happy, healthy retired people enjoying leisure pursuits, even finding bargains in supermarkets, thus demonstrating an enduring connection between thrift and old age.

In *'A Fresh Map of Life'*, Peter Laslett proposed a new perspective on ageing that seems to connect with being 'well off' in cultural, educational and psychological terms. He suggested a division of the life-course into four 'ages' in which the 'Third Age', characterised by personal achievement and self-fulfilment, is a time of 'limbo' experienced by those who have retired early, but not yet reached the 'Fourth Age', defined by 'dependency and decreptitude' (Laslett:1996:192). Laslett provided a counter-discourse to disengagement and structured dependency, arguing that retirement offered an opportunity to develop a distinct and fulfilling lifestyle not connected with working life. His ideas challenged the concept of a 'tripartition' of life into three phases of preparation, 'active' work and retirement, offering a transitional phase between working and not working.[21]

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[20] See Crystal & Shea (1990) 'Cumulative advantage, cumulative disadvantage and income inequality among elderly people', *The Gerontologist*, 30, pp437-443. This paper argues that private pensions and assets, together with work-related investment resources, produce a cumulative benefit that contributes significantly to income inequality in retirement.

[21] This connects with Ekerdt's (1986) argument that retirement was legitimated by a 'busy ethic' in which active and occupied leisure was consistent with the ideals of the work ethic, helping individuals as well as society to adapt to retirement as a positively valued state.

'Boomers don't just populate existing lifestages or consumer trends, they transform them.'[22] Perhaps in part as a consequence of its sheer size, the 'baby boom' generation has altered every stage of life as it has passed through it, from the invention of the teenager to the cliché of the mid-life crisis. The demographic revolution associated with the 'baby boomers' has perhaps started to shift the epicentre of consumer activity from its focus on youth to the needs, challenges and aspirations of middle-aged and mature consumers. Some 'baby boomers' are now taking early retirement and the rest are approaching the post-work phase of life. 'The demographic, social, political and economic significance of this cohort marks them out as the true inheritors of a new 'third age" (Gilleard & Higgs:2002:372).

PART 2: FROM WORK TO RETIREMENT: LABOUR MARKET AND PENSION POLICIES

In recent decades, retirement has expanded in both directions due to a combination of increased life expectancy and shorter working lives. This expansion has, particularly in the last decade, caused a so-called pension 'crisis' for government and has instigated debates about the funding of pensions. Early retirement is regarded as a key element of this crisis given that an increasing number of people are leaving employment before the statutory retirement age for a variety of reasons such as redundancy, ill health and increased caring commitments, as well as through choice.

> 'The underlying problems come from a number of directions – economic, social and cultural. The economic foundation of retirement has been undermined with the unravelling of state and personal pensions...The social desirability of retirement is also being questioned, as governments attempt a switch from an 'early exit' to a 'late exit' work culture' (Phillipson:2004:155).

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[22] 'Age Wave' is an American organisation founded, by gerontologist Dr Kenneth Dychtwald, on the premise that many of the social, economic and physical problems of ageing are preventable. The programme promotes positive ageing by encouraging individuals to take responsibility for their own mental and physical health and by understanding that the choices we make regarding how we care for ourselves, how we manage our finances ultimately shape who we become, both personally and culturally, in our later years. Its recent focus has been on the effect of the 'baby boom' generation reaching retirement (see www.agewave.com).

So what roles do people expect government, employers and individuals to play in the planning and funding of retirement? There is a 'division of risk' between collective social security provision and the individual (Drakeford:2000:148) and Part 2 of this chapter explores that division, looking at the government context of employment and pension policy and individual responsibility for pension planning and financial provision in retirement.

- **The government policy perspective**

  - **Older workers and labour market policy**

The establishment of retirement set a limit on labour force participation and created a distinct life-stage both chronologically and structurally defined by exit from the economically active labour force.

> 'State policy towards the employment of older people appears to shift according to short-term economic expediency rather than being guided by any consistent principles. Thus age-discriminatory policies...have been implemented at one time, while only a few years later government policy has been to promote later retirement' (Ginn & Arber:1996:49).

Labour market fluctuations accentuate the 'push/pull' effect on older workers so that, in times of high unemployment, governments have introduced policies to 'persuade' older workers to retire as a means of redistributing work to younger workers.[23] Changes in the structure and organisation of work, within the context of the application of F W Taylor's theory of 'scientific management', firmly established early retirement as a political and economic tool, 'a means of rationalisation...which facilitated efficient regulation and control over the workforce' (Harper:1989:105). This was 'officially condoned' as a means for employers to lay-off older workers, especially those between 50 and retirement age

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[23] In the 1930s, many politicians stressed the moral as well as economic advantages of such redistribution. 'A man of 60 who has worked all his life will not suffer much demoralisation through living in idleness, but a man of 20 may suffer irreparable harm' (Mosley quoted in Phillipson:1983:21). Questions as to older workers' ability to adapt to new working practices were raised by Henry Ford: 'The man who has never had any experience at all is the best fellow when it comes to fitting him into a new scheme of production' (quoted in Phillipson 1983:25).

(Walker:1981:84).[24] At other times, the 'moral obligation' of older workers has been used to encourage them not to leave the labour force. The 'constant theme' at that time focused on the detrimental effect of retirement with 'medical evidence being invoked to justify the economic need for workers to delay retirement' (Phillipson:1983:32).[25] This had little to do with capacity for work or productivity.

> 'It is one thing to be able to show that productivity is, by and large, affected only minimally, if at all, by age, and quite another thing to ensure that unfounded prejudices...held by employers...do not unfairly reduce employment opportunities' (Parker:1982:86).

According to Alan Walker, retirement emerged as a mechanism for rejuvenating the workforce and, in effect, represented a form of institutionalised generational succession. The principle of intergenerational solidarity had been evident in the design of the old early retirement programmes, and became official government policy with the introduction of the Job Release Scheme in 1977, but the tendency to favour younger workers has become 'a perspective that is rooted in the past and is clearly at odds with the changing life-course' (Taylor & Walker:1996:185).

During recent decades, however, a culture of early retirement has developed to the extent that it has become 'standard practice for most employees in the industrialised world' (Van Dalen & Henkens:2000:209),[26] so policies aimed at discouraging early retirement are currently high on the government's agenda and will require attitudinal and cultural change by individuals, employers and trade unions. The attitudes of employers and managers are associated with a range of employment practices which affect older workers relating to trainability, creativity, physical capabilities, the ability to interact with younger workers and return on investment, amounting to the 'operation of workplace social closure and the social construction of age in organisations' (Taylor & Walker:1998:641). There is, nevertheless, evidence to suggest that many employers value older workers for their

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[24] The Department of Employment concluded that the Redundancy Act 1965 became a social mechanism for removing older people from the labour force by means of comparatively generous compensation (Laczko & Phillipson:1991:18).

[25] Phillipson (1983) cites a number of studies which suggested a 'breakdown theory' of retirement - that working men were 'significantly happier' than their retired counterparts, that retirement was a 'ticket to death' and making a connection between retirement and the suicide rates for older men.

[26] Trade Unions have been an important force favouring early retirement as a well-earned respite after a hard working life.

experience and stability, and younger workers for their skills especially with new technology (Walker:1996:175).

'Simplicity, security and choice: Working and saving for retirement' (DWP:2002) emphasised the need for older people to stay in work longer by promising to 'introduce measures to extend working lives' and stating that 'many people are leaving employment too early,' at least from a government perspective. Policy proposals have included providing help for people over 50 to return to work,[27] treating men and women between 60 and 64 as active labour market participants and implementing age legislation covering employment and vocational training. There is, however, something of a paradox in introducing policies for 'older workers' as a group whilst at the same time attempting to break down age barriers in the workplace. Furthermore, 'age discrimination legislation tends...to have many exemptions and justification for different treatment' (Hornstein:2001:4). Other policies of potential benefit to older workers, identified in *'Forging a new future: The experiences and expectations of people leaving paid work after 50'* (Barnes *et al:*2002), included equal rights to training, the right to work part-time and/or flexible hours, and the abolition of a compulsory retirement age. The two following sections focus, in more detail, on age discrimination and flexible work and retirement.

- **Age discrimination in the workplace**

Age discrimination has become a key factor influencing early retirement since the 1990s. The impact of recession was felt by people in relatively senior, white-collar occupations in the public sector, finance and commerce, and their voices of dissent helped shift popular perception regarding early exit.

> 'Previously it had been seen as a necessary and socially acceptable means of coping with mass unemployment and structural change. Now...it was seen as a phenomenon deriving from age prejudice' (Loretto et al 2000:282).

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[27] For example, New Deal 50+, launched in 1998, subsidised employers for recruiting older people who had been unemployed long-term.

Discrimination on the basis of age is common, and older workers are often a low priority for training and retraining. In the professional and managerial sector, age limits effectively prevent older workers from applying for jobs, and lack of availability of training and retraining make them ineligible. Both of these were factors in *'How we waste the middle aged'* (Fogarty:1975) in which Fogarty promoted the concept of 'productive ageing'. The British Labour Force Survey of 1991 found that, whereas 24% of 16-19 year olds had received job-related training, only 8% of 50-59 year olds had done so (Phillipson:1998:82). More recent figures suggest a marked improvement in the older age bands, with 16.5% of women aged 50-59 and 14.5% of men aged 50-64 receiving training in the Autumn 2005 period.[28]

The aim of recent government-backed campaigns against ageism has been to persuade employers that discrimination against older employees is not only irrational but also commercially damaging (DfEE:1999). In the US, 'productive ageing' has drawn together those who hope to devise new approaches to supporting mature and older people in the workplace (Caro & O'Reilly in Bernard & Phillips:1998:87). Similarly in the UK, employers and government have, for some time, been concerned about the costs of failing to utilise mature workers and the need to make a case for recruiting and retaining this age group (Institute of Personnel Management 1993 cited in Bernard & Phillips op cit:88). It is also argued that early exit has resulted in skill shortages and a loss of the 'collective memory' of organisations, and that, given the ageing of the population, older workers help firms understand better the needs of the ageing market and provide a more age-balanced interface with customers (Loretto *et al*:2000:284).[29]

By 2020 25% of workers will be aged 50+ compared with 20% in 1990, so the development of effective policies is becoming an issue of prime importance in the field of work and retirement. Longer retirements and shorter working lives represent a challenge for governments in the twenty-first century to create policies that offer incentives both to employers, and to older employees to delay an early exit and to increase labour market participation among the 55+ age group. Innovative schemes, such as more flexible

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[28] I use 'suggest' because the survey warns that pre-Summer1994 statistics are not directly comparable with those for later periods: see www.statistics.gov.uk/STATBASE/Expodata/Spreadsheets/D7928.xls

[29] See http://www.bitc.org.uk for Business in the Community 'Workplace Impact Diversity Award' made to B&Q, the DIY store, for 'providing evidence to show that diversity is more likely to result in a mix of talents needed for a successful company.' Their policy of diversity not only includes removing altogether the retirement age of employees, but also employing disabled people and people from different cultural groups.

pensions and retirements, improved training over 50 and more widespread use of flexible working, might help to ease the pension and other fiscal burdens on a shrinking taxpaying workforce. From October 2006 it will be illegal to discriminate against anyone on grounds of age, whatever the normal pension age specified by a company's pension scheme. A default age of 65 has been agreed, beyond which an individual who does not wish to retire will be able to request the right to stay in work, but with no legal requirement on the employer to grant it. Age discrimination legislation has a major role to play in overcoming barriers to the employment of older workers.

- **Flexible retirement and the work/life balance**

In *'How we waste the middle aged'* Michael Fogarty (1975) proposed solutions to the problem of the waste of skills and experience of people approaching retirement. These included flexible retirement and pensions, sabbaticals aimed at supporting the forty to sixty age-group at work, and bonuses for working until 70. Thirty years later, the government has only recently introduced a policy that allows for pension enhancement through delayed retirement, and is beginning to formulate policies that will facilitate more flexible retirement.

The traditional image of retirement as being a sudden change from employment in a full-time career on Friday to doing nothing on Monday is increasingly out of date (Hirsch:2003). Laczko & Phillipson (1991) argued for a restructuring of pensions policy, and an abandonment of the work/retirement dichotomy, that would allow greater flexibility for people wanting to leave employment gradually over a 'decade of retirement.' More recently, a study of transitions from work to retirement found that almost as many people leaving permanent jobs between ages 50 and state pension age go into part-time, temporary or self-employed work as retire directly (Lissenburgh & Smeaton:2003). However access to higher quality 'bridge' jobs is greater for certain groups than for others.[30]

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[30] Although women more commonly take up part-time work at lower rates of pay, the position of retiring teachers and supply teaching is more closely linked to the possession of qualifications and the establishment of previous networks when in work. For more detail on retired teachers and supply, see Part 3 of this chapter.

Walker (2002) argues for a strategy of 'active ageing' that links key areas of policy such as pensions, employment and retirement rather than pursuing a piecemeal, compartmentalised approach to the challenges of ageing populations. 'Active ageing' suggests a general lifestyle strategy for the preservation of physical and mental health as people age, rather than just trying to make them work longer.[31] Walker argues that

> 'the essence of the emerging modern concept of active ageing combines the core element of productive ageing with a strong emphasis on quality of life and mental and physical well-being' (p124).

Thus his 'strategy' would include not only pension incentives to delay retirement and policies aimed at combating age barriers and enabling more flexible retirement, but also the promotion of a lifecourse perspective on the benefits of a healthy lifestyle and lifelong learning, and the importance of age self-management.

Flexible working and retirement might, potentially, offer substantial benefits to governments, employers and individuals. For governments, flexible options might help to reverse the now established patterns of early retirement whilst enabling employers to make better use of the skills and experience, the institutional memory, of older people. There is evidence to suggest that older workers would welcome policy initiatives which facilitate a flexible or phased retirement (Barnes *et al*:2002:22), but such initiatives need the support of employers and may be complicated to administer, particularly in terms of pension entitlements. A survey by the Department of Work and Pensions (2001) found that four in ten of those aged 50-69 would be likely to take paid work after formal retirement. Another survey (Employers Forum on Age:2002b) found that 93% of employees of all ages would extend their working lives if flexible working were offered. Patricia Hewitt, when Secretary of State for Trade and Industry, argued that flexible employment options could solve recruitment and retention difficulties by making staff more loyal, motivated and productive (Hewitt:2004).

Recent policies, such as family tax credits, have tended to concentrate on supporting younger people with families in work. But given the caring roles often undertaken by older workers, particularly women, it could be argued that family friendly policies for older as well

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[31] Alan Walker distinguishes 'active ageing' from 'productive ageing', a US concept that, whilst promoting a positive approach to retirement, was more closely associated with extending economically productive life.

as younger workers are required if a wider pool of available talent and experience is to be retained. A large proportion of women (and men) in their fifties have some form of caring responsibility, and those who work and care express strong commitment both to doing their job properly and to fulfilling their caring commitments. In seeking the right work/life balance between paid work and other aspects of their lives, some older people wish to put greater emphasis on unpaid activities, whether alongside or replacing paid work (Barnes *et al*:2002). So flexibility is potentially helpful in later life careers and appears to be popular with older individuals who need or wish to combine their work and caring responsibilities with their retirement plans.

Organisational approaches to flexible working practices for older staff are shaped by external forces, such as the design of pension rules. Currently, many policies are 'all or nothing' schemes and assume a dichotomy between people inside and those outside the labour market. Some pension schemes are designed so that once an individual has 'retired' there is no return to work, but recent policy proposals have been aimed at ending this 'cliff-edge' approach to retirement (DWP:2002b:98).

> 'Instead of the abrupt, non-negotiable 'guillotine' of retirement at a fixed point, individuals are presented with a choice as to whether, and how, to combine work with other commitments and interests' (Platman:2004:182).

Recommendations include financial incentives for those deferring their state pension; tax changes to permit part-time employees to work for their existing employers whilst also drawing their occupational pension; and mechanisms that allow individuals to continue to build up pension entitlements whilst working past normal retirement age. The aim of these proposals is to enable a smoother and more gradual transition from full-time employment to full-time retirement.

A gradual retirement arguably has the potential to be a most fulfilling stage of 'working' life in which an individual could say 'no' to unattractive offers and concentrate on more satisfying and rewarding work. In this way, it would be possible to remain connected to the workplace and retain a sense of challenge during a period of transition. In the education sector, supply teaching can work in this way, and has indeed done so for a majority of the

retired primary teachers interviewed for this research.[32] It has been argued that meaningful work is critical to self-worth in later life (Weiss & Bass:2002) and part-time work can potentially offer a 'win-win' situation offering a positive social and economic role for older people, supplementing their 'retirement' income and enabling them to make a substantial contribution to society. In this way, older workers could be spared a sudden drop in income and loss of meaningful work. However it has been suggested that this kind of work may provide a more precarious and unsatisfying route out of the labour market (Platman:2004). And Phillipson has argued that 'the urgency for policy reform and initiatives is precisely to ensure that flexibility does not translate into insecurity and uncertainty for a large number of people' (Phillipson:2002:27).

- **The individual perspective**

  - **From collectivism to individualism: The New Right and pensions**

For the perspective of the individual in pension provision, it is useful to look back to the 1980s where the changing balance between state and individual responsibility had its roots. The New Right ideology of the Thatcher era emphasised individualism rather than collectivism in, amongst other things, pension provision which was restructured to reduce the role of public pensions and increase publicly subsidised private pensions (Walker:1996:21).[33] The value of the state pension, and therefore its cost to government, declined as it was index-linked to prices instead of earnings. Furthermore, tax incentives and subsidies were given in order to encourage people to opt out of the State Earnings Related Pension Scheme (SERPS) and into private pension provision.[34] A further significant development enabled occupational pension contributions to be transferred from

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[32] See Chapter 6 for research findings on this form of flexible retirement, and Chapter 8 for the challenge aspect of working in retirement.

[33] The 'public burden' model of welfare was at the heart of neo-classical economic assumptions concerning respective economic contributions of the public and private sectors, and particularly the contention that the former was an unproductive burden on the latter.

[34] This policy led to approximately 75% of the workforce belonging to occupational or personal pensions by the mid-1990s.

one employer's scheme to another, which was beneficial in the context of a more flexible and insecure job market.[35]

The shift of emphasis towards private pension provision, and the individual's responsibility for financial security in retirement, has continued, even accelerated, under the present government. For example, in *Simplicity, Security & Choice: Working & Saving for Retirement,* the Department of Work and Pensions warns that:

> 'Longer life spans mean that people will have longer retirements – if people choose not to work longer, they will need to save more' (DWP:2002b:3).

Since the level of state pensions is determined by government, and means-tested social security benefits offer only a minimum safety net, individual responsibility for pension and post-work financial provision is related to savings, investments and private pensions. If an individual is to enjoy a lifestyle similar to that experienced during his/her economically active life, then significant additional savings and contributions have to be made.
From the perspective of individuals who have savings or occupational pensions, the so-called 'pension crisis' is more concerned with the reduction in pension values as a result of stock market falls and company pension policy failures. Furthermore, whilst relatively low interest rates are good for borrowers, people with savings intended to provide retirement income receive a relatively lower income than might have been anticipated.

- **Risk management and financial security in retirement**

Retirement planning by individuals necessitates a degree of risk management. For those without occupational pensions, there can be an incentive, particularly if there is entitlement to Invalidity Benefit, to retire early. In effect there is little to be gained by continuing in what may well be repetitive, dull, low-paid work if early exit, with benefits, is an option. This is in contrast to those with some occupational pensions that calculate the pensions based on final earnings, and if there is a chance of a pay increase or promotion in the last few years

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35 The new Stakeholder pension scheme is also designed to be portable, linked to the individual rather than the employer.

of employment, pension benefits are increased. It is probably for this reason that in groups without occupational pensions, there is a significant exit from the labour market at 55, whereas for those with such occupational pensions the fall is greatest at 60 (Blundell & Johnson:1998:172).

However, few people retiring early are able to make accurate calculations regarding their income, and whether or not it will meet their needs through what might be an extensive period without income from employment. It has been suggested that governments should give better advance information on public and private pension prospects as a first step to greater understanding but, given the inevitable and ongoing fluctuations in stock market values, making meaningful predictions is not really possible (Hirsch:2003). Donald Hirsch found that occupation and overall work history were more important predictors of financial resources than the timing of retirement, with workers in professional and managerial jobs tending to enjoy greater choice and control over how and when they left the workforce than those in less privileged occupations.

There are serious problems with some of the occupational and private personal pensions on which so many people rely for their retirement income now that the emphasis on this sector is so great. Stock Market falls and fluctuations have resulted in crisis and uncertainty regarding pension investments and created a new form of dependency on company pension administration and investment strategies. There has been serious concern in the past decade over the scandalous administration of some company pension schemes. Many companies have 'massaged up' their share prices by 'the trick of boosting profits through ceasing contributions to their pension funds' (Sunday Telegraph:26.01.03). This means that some of the UK's biggest companies are facing a 'black hole' in their pension schemes and their pensions funds are delicately balanced so that even slight changes in the market can have dramatic consequences. This is a significant development given that, as recently as 2000, a survey on attitudes to pensions and planning for retirement found that people with occupational and personal pensions were 'broadly confident that their pension arrangements would pay the pensions and benefits that they expected'. Most people regarded occupational pensions positively since they were perceived to 'offer a good return for people's money and were also secure' (Mayhew: 2001:61). However, there is not only a risk to individuals of poor investment performance

and low annuity rates, but also the fact that visible charges can still absorb up to 25% of an individual's pension fund, and hidden charges as much again (Ginn:2001:12).

> 'When politicians and pensions experts admit they find the British pension system hard to grasp, it is no wonder that individuals are bemused by pension scheme rules, and that many feel alienated or misled by 'information' from the state or the purveyors of private pensions' (Ginn:2003:21).

Individuals' lack of information about opportunities and entitlements is problematic, but the government has attempted to address this by emphasising the need to help people make informed choices about retirement and to encourage the development of simple and flexible savings products (DWP:2000). Financial information and understanding are generally weak among workers approaching retirement; they are strongest among people in professional occupations who receive useful information primarily from their employers and unions. For example, looking at the sections on pensions and retirement on the websites of teachers' unions, there is wide-ranging and detailed information on many aspects of retirement and early retirement, including financial details, as well as information on where to access further information if needed.[36]

PART 3: WOMEN, TEACHERS AND RETIREMENT

- **The gendered context of retirement**

The position of women has been different from that of men in terms of their labour market participation and, as a consequence, their pension situation. During the second half of the twentieth century, there was a substantial growth in women's labour force participation. However rates for women leaving work to care for others are significant, with 66% experiencing caring responsibilities at some point in their lives (Disney et al:1997). Despite changing attitudes towards gender roles, most of the burden of unpaid domestic and caring work is still performed by women (Ginn:2003:5). Women are less likely to work full-time continuously throughout their adult life and their access to pensions is limited both in terms

[36] See www.teacherspensions.co.uk for more detailed information about the Teachers' Pension Scheme.

of state and occupational pensions. This has potentially serious policy implications: recent statistics show that more than two million women are not building up entitlement to a basic state pension with fewer than a third entitled to a full state pension in their own right (Pensions Commission:2005).

British welfare institutions, as discussed in Chapter 1, were designed on the assumption that women would either marry and have financial support from a husband through the course of a traditional lifelong marriage, or would remain single and childless, pursuing a career in the same way as their male counterparts. Although state pensions have been modified to reflect changes in gender relations, their declining value, together with a growing emphasis on private pension provision, has rendered these changes ineffective in ensuring women's economic independence in later life (Ginn:2003:10).

> 'Women are <u>the</u> problem in terms of adequate pension support, and [they] will be an increasing proportion of the future workforce' (Macnicol:1999:404).

Early exit from paid employment by men has been extensively researched and the reasons for it, including redundancy, dismissal, lack of jobs, age discrimination and ill-health, identified (Laczko & Phillipson:1991), but the position of women is less well understood. Their attachment to the labour market is perceived as intermittent and peripheral and that, therefore, retirement and early retirement are inappropriate concepts. As some 75% women in their 40s are employed, the position of women is not only relevant now, but will be even more so in the future (Ginn & Arber:1996:28).

Despite changes to the pension system in the context of changing gender relations, the current pensions system remains inappropriate for the pattern of women's paid and unpaid work.

> 'Over their lifetime, most women work fewer hours for lower pay and for fewer years than most men. So they acquire less NI entitlement to a state pension, and fewer occupational pension rights. But that reduced pension income, given women's earlier retirement and greater longevity, has to last them for longer. Reducing the greater risk of poverty for women in old age requires action in each area' (DWP:2002:111).

Pension disadvantage stems from women's family and caring roles, including career breaks for childrearing, and as the balance of pension provision shifts towards the private sector, 'the pension penalties of motherhood are magnified' (Ginn:2001:5). Around 70% of

today's female pensioners have no private pension in their own right, though this may change as women tend to withdraw less from the labour market for child-rearing, with the result that future pension provision is likely to be improved. Older women tend to rely more heavily on the basic state pension, the value of which has declined in recent years.

Significant social change has included growing expectations of women's equality and financial independence irrespective of marital status. The sexual revolution gave women greater control over their fertility and there has been increasing recognition of women's workplace skills and educational qualifications. Alongside these changes has been a decline in the expectation of lifelong marriage, with increases in divorce, cohabitation and lone parenting, all of which have become more socially acceptable.

> 'These changes offer both opportunities and challenges to individuals and society and have profound implications for women's acquisition of pensions' (Ginn:2003:1).

The problem of women's pensions is moving up the political agenda.[37] Policies aimed at helping women have included additional investment in childcare, extra support for families, family tax credits, changes to maternity and paternity provision and the introduction of the Stakeholder Pension. These pensions represent an important development that should, in theory, benefit women given that they were designed, as flexible defined contribution pensions, with the employment patterns of women in mind, particularly the fact that there are no penalties for breaks in contributions or for changing providers.

But is the pension problem for women connected with a 'myopic unwillingness to plan for the future, or lack of net disposable income during working years'? (Macnicol:1999:404). Many women do not have the financial resources during their working lives for savings and pension contributions, but there is also evidence to suggest that some women fall into the former category. In a 2000 survey, it was found that women's knowledge of pensions issues was poor, with 22% saying they knew little or nothing about them. Only 17% had heard of Stakeholder Pensions despite widespread TUC publicity directed at their women

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[37] Whereas the government's Green Paper, *A new contract for welfare: Partnership in Pensions* (1998) contained little or no specific reference to the significant problems of women, in *Simplicity, Security & Choice: Working & Saving for Retirement* (2002) a whole chapter was devoted to this aspect of the pension 'crisis'.

members.[38] 62% of those who had given 'very little thought to retirement' were women (Mayhew:2001:91). The government has recognised this low awareness of pension issues amongst women, and 'intends to look at the information provided for women' and at ways of getting the pensions message across in a more effective way. 'We propose to look at how best to ensure that women are aware of their pension position and the choices they face' (DWP:2002:121).

Although some aspects of age discrimination, such as shedding older employees, operating fixed retirement ages, preferential hiring, training and promoting, affect both men and women, age discrimination appears to affect women at an earlier age due to employers' and managers' 'gendered ageism' (Ginn & Arber:1996:34). This is part of a corporate culture that affects women's self-image and saps motivation. Laczko & Phillipson (1991) found that 'discouraged (female) workers' ceased to look for jobs because they did not believe they would be employed. Promotion was also found to be a problem where women are trapped in a 'pink collar ghetto' that wastes abilities and prevents progress to more responsible positions (Allcock 1993 cited in Ginn & Arber:1996:36), again affecting their capacity to build adequate pension provision for their retirement.[39]

During their working lives, women tend to acquire less entitlement to both state and occupational pensions than men and what pension income they have, given women's greater life expectancy, may have to last longer. But for some groups of women the situation is different. The following sections of this chapter explore the position of professional women and the public sector pension position of women teachers.

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[38] For example, *Pensions for Women* (2001) and *Stakeholder pensions for women* (2001)

[39] Women teachers and promotion is explored in detail in Chapter 3, Part 3 in 'Women teachers' careers and the work/life balance' and 'The masculinisation of educational management.'

- **Professional women and pension provision**

People who work in professional and managerial jobs tend to enjoy greater control and choice regarding how and when they leave the workforce than those in less privileged occupations. Attitudes to work and retirement, together with health and family considerations, combine to create an appropriate climate in which to retire. Financial factors can act as a key element of choice, or act as a constraint, in determining when it is possible to leave. The opportunity to get good 'bridge' jobs between full-time work and full-time retirement are also much greater for certain groups than for others. As discussed in Part 2 of this chapter, the recruitment and retention problems currently being experienced in the education sector have resulted in the widespread availability of the 'bridge' of supply teaching. This gives teachers who are retiring from a full-time contract the choice of continuing to teach, but in a more flexible way to suit their preferred early retirement work/life balance, should they wish to do so.

The lower rates of promotion of women than men in the education system are, to a large degree, connected to career breaks, family commitments and the desire to achieve a work/life balance that takes account of these. However, in the broader context of women's pensions, women teachers are in a considerably more advantageous position than the majority of women. There are two aspects to this: firstly, the differentiation between women's pension position according to their education and qualifications and secondly, teachers are entitled to a public sector pension which teachers unions have played a key role in negotiating on relatively favourable terms.

The human capital context is significant in determining the likely level of women's financial security in retirement. A growing proportion of women with educational achievements to graduate level can expect to earn wages high enough to afford comprehensive childcare services, thus enabling them to continue to work and accumulate pension entitlements. According to an 'important and influential' Cabinet Office publication, the 'motherhood gap' in pensions (ie the difference between a childless woman and a comparable mother) will, in future, be negligible for young women with a degree or equivalent qualification (Rake *et al*:2000 in Ginn:2003:69). The report concluded that the effects of child bearing were minimal for graduate women. However, using data from the General Household Survey, research has demonstrated that the differentials in pension scheme membership between

women, on the basis of education, is negated by working part-time as opposed to full-time. Women graduates employed part-time were no more likely to have private or occupational cover than women full-timers with no qualifications (Ibid:71). In the context of professional careers such as teaching, women have shorter career breaks and gaps in employment when their children are young, and nearly half of professional mothers were employed full-time when their youngest child was aged 5-11, compared with a fifth of mothers in manual jobs (Glover & Arber:1995). All the teachers interviewed for this research had returned to full-time work before their youngest child was 11.[40] Furthermore, differences in patterns of return according to qualifications magnify pre-existing pay differentials among women. 'Women whose educational qualifications enable them to return after childbearing to full-time employment in the same job can maintain or improve their occupational status' (Ginn:2003:72).[41] Having a well-qualified partner reduces further the impact of motherhood.

> 'Homogamous partnering, in which men and women of similar educational level tend to marry or cohabit, reinforces differentials in household income and hence in capacity to pay for childcare' (Ginn:2003:72).

Although teachers enjoy the relative security of a public sector pension, the fact that many women teachers take career breaks to care for their young children means that they are not entitled to a full occupational pension on reaching retirement age. Meanwhile their male counterparts, who do not tend to take such career breaks, continue to accumulate qualifying years leading to a larger pension on retirement.[42]

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[40] See Appendix 4 for Research Sample Lifecourse Data including career breaks for childcare.
[41] The findings of this research showed that, for many teachers, returning to teaching after a career break had involved returning at a lower level than the post they had left. See Chapter 5 – ' Did they have career breaks, and if so, what effect did they have on their careers?'
[42] One of the teachers interviewed for this research felt that her years of part-time working whilst caring for young children should count as qualifying pensionable years.

- **Teachers' pensions and the role of their Unions**

The Teachers' Pension Scheme (TPS) is a contributory final salary scheme, the benefits of which are governed by the Teachers' Pensions Regulations 1997, and subsequent amendments. Full-time teachers who have not yet retired and who have not opted out of the scheme to make their own pension arrangements are automatically covered by the scheme. It pays guaranteed benefits, which are protected against inflation, the two components of which are an annual pension and a tax-free lump sum. The normal retirement age from the scheme, for both men and women, is currently 60 but it is possible to work beyond 60 and claim benefits on leaving pensionable employment.[43] Retirement benefits can be paid before 60 to teachers who become permanently incapacitated due to ill-health, or to teachers aged 50 or over whose employer makes an offer of a redundancy package and the opportunity to retire early.[44] Teachers also have the option, aged 55 or over, of applying for actuarially reduced retirement benefits.

During the 1990s, the government acknowledged that pension policies had acted as an incentive to early retirement in the public sector:

> '...particular problems exist in the public sector pension schemes. The scale of early retirement in a number of these schemes has increased to the extent that the very financing of the services themselves could begin to be jeopardised' (DfEE:1998:101).

Such policies resulted in the widespread loss of experienced personnel, as well as recruitment problems, across the public sector including local government, the health service, education and police service. Changes in 1997 to the regulations governing the TPS were made in the context of the high numbers of teachers taking retirement through ill health.[45]

Prior to 1997 it was possible to retire and subsequently return to teaching at a later date. Post-1997, a requirement for permanent incapacity was introduced and, as a result, between 1995 and 1999 average figures for teachers retiring in this way fell from 446 to

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[43] Recent proposals to raise this to 65 will be discussed later in this section.
[44] All the retired secondary teachers interviewed for this research had taken up the offer of a redundancy package. See Chapter 6.
[45] See Appendix 5 for the dramatic impact of this change on the early retirement of women teachers.

137 per month (Bowers & McIver:2000). This research found that teachers lose more time due to sickness than NHS staff with similar training levels, for example physiotherapists. More than half the teachers who had retired on the grounds of ill health thought that their work had contributed to their condition. Workload and paperwork were the most frequently mentioned contributory factors.[46] In the context of redundancy/retirement packages, when redundancies are announced by the governors of a school, teachers' unions must be notified of the details so that consultations can take place between the school, the employing education authority and unions. Local education authorities are responsible for the payment of redundancy pay and any enhancement of the lump sum and pension payments and teachers' unions are proactive in negotiating and, if deemed necessary, appealing pension-related decisions.

Another area of current interest for teachers and their unions is the proposed rise in the public sector retirement age. Following an announcement that the Government proposed to increase the retirement age from 60 to 65, there was an outcry from teachers' and other public sector unions. The campaign against the proposals was successful so that the changes will only apply to new pension scheme members and not to existing members nearing retirement. The changes were proposed as part of an overall strategy of pension provision, as set out in *Simplicity, Security & Choice: Working & Saving for Retirement* (DWP:2002) and the recent reports from the Pensions Commission (2004, 2005), and were powerfully opposed not only by teachers' unions but also by the TUC. However, private sector employers were unhappy with the government's *volte face* that could potentially cause problems between the private and public sectors. The TPS is currently undergoing a review with the aim of modernisation. The Review Group comprises, amongst others, DfES representatives, teachers' unions and employer associations and one of the possible options for change is a more flexible retirement through partial pension and part-time working. Increasing numbers of the public do not enjoy the guaranteed pensions of a Defined Benefits final salary pension scheme. The fact that public service pensions are backed by a Government guarantee makes them one of the most risk free and secure pension arrangements in existence, but such pension commitments represent a considerable cost to taxpayers.

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[46] For further details on the association made by the teachers in this research between retirement and paperwork overload, see Chapter 7.

CONCLUSION

Retirement is a life-changing process so the decision to retire is not a momentary event but rather a process that occurs over time. Work is not only a means of livelihood, but also an important social and moral institution. The work ethic emphasises traits associated with work such as self-reliance, initiative and independence. Leaving work is, therefore, an important event that affects the leisure and family life of individuals, their level of income, social interaction with colleagues, self-esteem and mental and physical health.

Financial provision for retirement is essentially a partnership between the state and individuals, albeit one where the burden of responsibility is increasingly being shifted towards the individual. But there are significant differences between individuals' capacities for pension benefit accumulation, between those with an occupational pension and those without, between men and women, between those with private and those with public sector pensions.

The recent policy agenda, as discussed above, has a threefold purpose:

- to remove any incentives in the pensions system to retire early, such as those that existed in the Teachers' Pension Scheme prior to 1997, and to provide incentives to later retirement, such as enhanced pensions
- to encourage later retirement from paid employment by introducing greater flexibility to the transition from full-time work to full-time retirement and policies to limit age discrimination in the workplace, and
- to encourage individuals to be better prepared, in financial terms, for retirement.

The second half of the last century saw the demise of the male breadwinner model and a new assumption that both men and women could engage in paid work throughout their lifecourse. In the new 'independence model', women's financial security is based on their own labour market contribution but this is, in reality, only viable where there is clear political acceptance of care as work which has to be properly valued (Pascall & Lewis in Ginn:2003:110). Professional women, such as teachers, are potentially closer to their male counterparts in terms of their financial preparedness for retirement.

The 'pension problem' is one for both government and for individuals, but forthcoming legislation that will outlaw age discrimination and policies that enable a more flexible retirement transition could, potentially, ease the problems caused, for government, by the early retirement phenomenon. However for individuals in a position to choose to retire early in the context of favourable financial circumstances, and possessing a positive perspective of 'life after work', there is unlikely to be sufficient incentive to continue in a career that no longer offers fulfilment and job satisfaction. The next chapter looks at women teachers and the education system, and the ways in which government education policies have, in recent years, changed the work of teachers and acted as a potential 'push' factor towards early retirement.

CHAPTER 3

GENDER AND THE EDUCATION SYSTEM: THE IMPACT OF EDUCATIONAL CHANGE ON WOMEN TEACHERS

'Changes in ideological, demographic and economic conditions, accompanied by shifts in government education policies, alter the context within which women teachers' commitments and career patterns are shaped"[1]

INTRODUCTION

PART 1: WOMEN AND THE TEACHING PROFESSION

- The 'feminization' debate
- Women in primary and secondary teaching

PART 2: A PURPOSIVE SELECTION OF EDUCATION POLICIES

- Comprehensive schools and examinations
- The 1988 Education Reform Act
  - The National Curriculum and Standard Assessment Tasks
  - Local Management of Schools, Open Enrolment and 'parentocracy'
- A new school inspection regime

PART 3: EDUCATIONAL CHANGE AND WOMEN TEACHERS' RETIREMENT DECISIONS

- Women teachers in the 1990s: education policy 'push' factors
- Teacher professionalism: autonomy, status and morale
- Women teachers' careers and the work/life balance
- The 'masculinisation' of educational management
- Social change: pupils and parents as 'push' factors

CONCLUSION

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[1] Aldrich:2002:84

INTRODUCTION

During the careers of the teachers in this research, there have been significant and far-reaching changes in the education system, particularly since the 1988 Education Reform Act.

In Part 1, my exploration of the gendered impact of these changes will put the role of women in the teaching profession into context, looking specifically at:

- The 'feminization' debate, and
- Women in Primary and Secondary teaching

Part 2 of this chapter identifies key policy changes recognised by teachers themselves as significant to their careers and working lives that are potential 'push' factors in decisions about early retirement. The policies to be analysed are:

- Comprehensive schools and examinations
- The 1988 Education Reform Act (ERA)
  - The National Curriculum and Standard Assessment Tasks (SATs)
  - Local Management of Schools (LMS), Open Enrolment and 'parentocracy'
- A new school inspection regime

The transition to comprehensive education is explored both in a structural and social context and the section on the ERA covers two key issues that have been accorded a central place by teachers in explaining their professional lives thereafter. I have not included legislation regarding Grant Maintained Schools or City Technology Colleges since they were not directly relevant to the teachers in this research.

These policies have affected both male and female teachers but Part 3 is devoted to their specific impact on women. Jane Miller argued that there is an 'implicit misogyny' in much government education policy,[2] and there is now an arguably more masculinist style of

[2] For example in the 'constant surveillance of teachers' under the new inspection regime (Miller:1996:9).

school management that may have a gendered effect on promotion. The issues explored in Part 3 are:

- Women teachers in the 1990s: education policy 'push' factors
- Teacher professionalism: autonomy, status and morale
- Women teachers' careers and the work/life balance
- The 'masculinisation' of educational management
- Social change: pupils and parents as 'push' factors

The conclusion draws together the three parts of the chapter, looking at policy outcomes in relation to women teachers in the context of structural change, and the translation of these into 'push' factors in their early retirement decisions.

PART 1 - WOMEN AND THE TEACHING PROFESSION

- **The 'feminization' debate**

> 'The feminization thesis has at least two interpretations – that of number and that of ethos. While it is possible to argue with some degree of confidence that the first kind of feminization is visible, the second kind of feminization...is much harder to substantiate' (Coffey:2001:96).

Firstly, looking at the issue of feminization in terms of numbers, the 1870 Education Act that introduced elementary schooling for children aged 5 to 10 increased the demand for teachers, many of whom were women. In 1872 51% of elementary school teachers were women, rising to 70% in 1896 and to 75% by 1913, remaining on or around that level until the Second World War (Bradley:1989:206). This increase, in numerical terms, represented a dramatic feminization of teaching which was evident in what Elizabeth Edwards described as a 'culture of femininity' in residential teacher training colleges where many elementary teachers trained (Edwards:2001:2). More recently, the proportion of women in teaching has been increasing, particularly over the last 15 years, at each level of the school hierarchy and across subjects (Johnson & Hallgarten:2002:126). Recent DfES figures show that approximately 70% of teachers are women and 30% men (DfES:2004), but this proportion does not apply across both sectors since women teach predominantly in

primary schools. In the primary and secondary sectors 84% and 56% of teachers respectively are women.[3] It is evident from the statistics that, in purely numerical terms, the profession is, indeed, female-dominated.

Secondly, looking at feminisation in terms of ethos, the education system has been, and continues to be, male-dominated in terms of policy and patriarchy. Whilst there have been several noteworthy female Ministers of Education, including Margaret Thatcher in the 1970s and more recently Estelle Morris and Ruth Kelly, policy-making has tended to be male-dominated both in national and local government, and in schools themselves. In 1987, Stephen Ball suggested that women are regarded as 'peripheral to mainstream organizational concerns' because of the numbers who work part-time, the concentration of women in primary schools, the lower proportion of women teachers who are graduates and the fact that many women take career breaks to bring up their families (Ball:1987:71). Today, many women teachers work part-time and women are still concentrated in the primary sector so little has changed apart from an increase in the numbers of women teachers who are graduates.

In *Victorian Women*, Hellerstein *et al* (1981) argued that women's position in teaching was firmly in the lower ranks of the developing educational hierarchy which reproduced the structure of the patriarchal family with the female teacher under the direction of the male administrator. This is still the case today, arguably even more so given the advent of manageralism in schools and positions of power overwhelmingly dominated by men.[4] So the majority of teachers are women but the position of men and women in the profession as a whole mirrors their position within international labour markets; the numbers of women securing senior teaching posts remains disproportionately low (Coffey:2001, Acker:1994, Boulton & Couldron:1998). Teachers of the youngest children tend to be women whilst men tend to teacher older children. Whilst there are more female infant head teachers than there are male, the proportion of male heads is higher at junior and higher still at secondary level.[5]

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3 See Appendix 2 for percentages of full-time qualified teachers and head teachers in service in the maintained schools sector by grade and sex (England)

4 See Part 3 of this chapter: 'The 'masculinisation' of educational management.'

5 See Appendix 6 for head teachers by gender in England and the study city.

Coffey argues that, whilst teaching has become increasingly *feminized* in terms of numbers, it has not become more distinctly *feminist* in terms of career trajectories, discourse and ethos (Coffey:2001:96). There is a historical basis to the contemporary situation in that men, from the earliest days of state-funded education, were more likely to go to university and go on to teach their degree subject at secondary level. Women were, until the 1960s, unlikely to go to university prior to a teaching career, but if they did, they tended, like men, to teach their degree subject at secondary level, often in grammar schools. In contrast, women who trained via the teacher training college route usually became primary teachers. Furthermore, there are gender divisions along subject lines. Subjects dominated by male teachers, for example science, mathematics and technology, are generally seen as more 'learned' or 'expert' than female dominated subjects.

Yet despite policy and power being male-dominated, there have recently been calls for more male teachers to be recruited to the primary sector. Teaching as a career has a relatively low status, especially for men (Penn & McQuail:1997) and concern is growing in the early twenty-first century about the low numbers of men entering primary and nursery teaching.

> 'Parents, pupils, other teachers, governors and head teachers greet male students and teachers with excitement, awe (or fear), precisely because they are a rare commodity' (Thornton & Bricheno:2000:203).

Paradoxically, there is 'widespread agreement that women should work with younger children, where the role is seen as one of nurturing, and men with older pupils, who are seen as more rational' (Hutchings:2002:128). This pattern is often replicated within primary schools where men more often work with the older classes. Current concerns focus on the need for male role models for underachieving young boys who may lack such a role model in their family lives. In this argument, male teachers would become the panacea to solve the problems posed by boys. However, there is no evidence to suggest that pupils do see teachers as role models, or that large numbers of male teachers would bring about positive change in the behaviour, attitudes and attainment of boys (Hutchings:2002:128-9). Stephan Shakespeare described primary schools as possessing a 'cissy culture, which suited girls better than boys' (Daily Mail, 5.1.98 quoted in Hutchings op cit:129), and the chief executive of the Teacher Training Agency claimed, in 2000, that

> '...the issue of boys' underperformance is a complex problem. But we are clear that we can contribute to the solution by increasing the number of men coming into primary training' (Op Cit:130).[6]

Once male teachers are qualified and in post, they tend to acquire a disproportionate number of high status or senior posts. So there is an imbalance not only in the number of men and women teachers in both the primary and secondary sectors, but also in the number applying for and attaining the top posts. The next section will look at the differences between the roles of women teachers in primary and secondary teaching.

- **Women in primary and secondary teaching**

In 1960, over 60% of women graduates went into school teaching or lecturing. By 1966 this had grown to 71%, mainly as a result of fewer going into industry.

> 'Given earlier educational and general socialization experiences, which led 60% of the women to graduate in an arts discipline, such occupational segregation was largely predictable' (Deem:1980:164-5).

Furthermore, Deem argues, women 'predictably' predominate in the less prestigious and less well-paid categories. The teachers interviewed for this research were training and entering the profession at this time and, as was usually the case, the majority of those with degrees entered the secondary sector whilst most of the primary teachers were trained in teacher training colleges.[7]

The ethos of the primary school differs significantly to that of the secondary school and, because of this, in the experiences and roles of the women teaching in them. As discussed in Chapter 1, teaching has been regarded as a career that fits well with family life and responsibilities, and it is this feminized ethos, particularly in primary education that will now be explored in greater detail.[8]

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[6] Stephan Shakespeare was a headmaster in Los Angeles and head of special needs in a Lambeth Comprehensive. He has written extensively on education policy for a variety of national newspapers and is Director of Public Opinion Research and co-founder of YouGov.

[7] Appendix 7 shows the routes into teaching of the primary and secondary teachers in this research.

[8] For the purpose of this discussion 'ethos' is taken to mean the characteristic spirit of the community, a characteristic spirit that in primary schools is regarded as being closely linked to the family.

The socialisation of women as nurturers, as carers, exerts a powerful influence over the way they perceive and act out their role as a teacher. In *Carry on Caring*, an ethnographic study in an English primary school, Sandra Acker identified the class-teacher system as responsible for the mother-like intense attachments and dedication primary teachers show for their classes (Acker:1995). In the primary environment, a teacher is with her class for the majority of their time in school and is responsible for the 'whole child' and the 'whole curriculum' (Burgess:1989:80). Furthermore, Acker argues that 'child-centred pedagogy rests on notions of care and empathy associated with women and particularly mothers' (Acker:1995:23). There exists an almost possessive discourse around this relationship in which teachers refer to 'their' class, 'my' pupils: 'Like good mothers, good teachers find their work is never done' (Ibid). There is widespread use of maternal analogies in discussions about teaching young children.

The relationship between teacher and pupil in primary schools tends to be much closer, more 'parental' than in secondary schools: primary schools are 'smaller than secondary, more locally centred, community-related, 'warm and caring', family oriented' (Woods:1987:121).[9] The status of primary teaching has been linked to the status of women: the younger the child, the lower the status of its teacher. Higher status, and subsequent authority and power go with the teaching of older pupils and maleness. This power/status paradigm is illustrated by the gender distribution of teachers not only between schools in different age phases, but also within primary schools where there are 'gendered and patterned inequalities in power relationships' (Thornton & Bricheno:2000:192). Stephen Ball suggested that the 'massive underrepresentation' of women in senior posts frequently created a situation where a male head-teacher was working with an all-female staff, described by Tyack (1974) as 'a pedagogical harem' (quoted in Ball:1987:192). Female teachers, in addition to their 'maternal' role with their pupils, also 'care' for each other, creating a working environment, the main characteristics of which are compassion, collaboration and community in the primary sector (Acker:1995:21).

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[9] The 'family oriented' ethos of the primary school was evident in the 1993 proposal by John Patten, then Education Secretary, for a 'Mum's army' of non-graduate and differentially trained nursery and Key Stage 1 teachers. This policy proposal seemed to make explicit the implicit low status of primary teachers and illustrated, in a very public way, teacher stratification within the educational division of labour.

In contrast with primary schools,

> '...to all intents and purposes...secondary schools, are male institutions. The definition of the school reflects the values and meanings of men's culture.. The language and structure of schooling are predominantly shaped by patriarchy' (Ball:1987:192).

Ball argued that secondary schools have a 'gender regime' of male dominance in which male and female teachers have different roles. In this sexual division of labour, with its association between authority and masculinity, the power structure is such that most administrators, principals and subject heads are men. There were, Ball suggests, evolutionary reasons for this in that, when grammar schools and secondary modern schools were amalgamated to form comprehensives, there was what amounted to a 'male takeover' in terms of school management. Most grammar schools were single-sex institutions and, typically, male head teachers of boys' schools became heads of the new comprehensives.

> 'The arrival of mixed schools and the growth in the size of schools did nothing for the career chances of women except to diminish the likelihood of their achieving headships' (Lowe:1997:18)

The vast size of many secondary schools precluded any real sense of 'family' atmosphere. Organisational complexity inevitably increased in relation to size – more pupils, lessons, staff, subjects, curriculum requirements and options, examinations, reporting, general administration – and a highly complex division of labour developed in which some of the duties previously undertaken by class teachers were provided by specialists with specific responsibilities and specialised qualifications. Secondary schools have 'sophisticated pastoral structures' which include year tutors, assistant year tutors, liaison officers, heads, assistant heads, deputy heads and so on (Ball & Goodson:1985:9).

At the time when secondary schools were amalgamating to form comprehensives, this division of labour involved a separation and stereotyping of the academic-grammar and pastoral-secondary-modern roles. The assumptions underlying this were that secondary modern teachers possessed the skills and experience for dealing with disciplinary, social and personal problems and grammar school teachers were accustomed to academic and examination-related teaching.

> 'These differences in orientation and interpretation are not simply based upon the contrasting traditions of grammar and elementary schooling. They are to be found in pronounced form in many purpose-built comprehensives' (Ball:1987:65).

Furthermore, the balance of power between these two systems had implications for the career opportunities of the teachers who committed to one path or the other. Women are concentrated in promoted posts that are mainly pastoral in nature (Torrington & Weightman:1989), posts that combine teaching with caring roles. Furthermore, this tension between academic and pastoral sectors of the curriculum continues to be at the heart of current debates about 'educational standards on the one hand, and the social, personal and moral development of young people on the other' (Coffey:2001:49).

PART 2: A PURPOSIVE SAMPLE OF EDUCATIONAL POLICIES

Myriad education policies have been introduced during the careers of the women teachers in this research:

> 'The period (1976-2001) saw fundamental changes in the structure and nature of educational institutions, in the organisation of the curriculum, in the nature of teachers' work and professionalism, and in the aims and purposes of assessments' (Phillips & Furlong:2001:3).

A purposive selection of key policies widely regarded, by academics, teachers' unions and teachers themselves, as having a deeply felt influence on the professional careers, lives and day-to-day work of teachers are discussed here.

The first change, the development of the comprehensive system, began during the early stages of the careers of this group of teachers when they were relatively inexperienced. The other changes, in the 1988 Education Reform Act and beyond, took place during the later stages of their careers, and are associated with one of the most frequently cited reasons for exit – excessive workload (Smithers & Robinson 2003). As already mentioned in the introduction to this chapter, these policies will also have affected male teachers, but whilst Part 2 of this chapter is designed as a descriptive analysis of selected policies, Part 3 will explore their differential and more specific impact as an 'exit' factor for women teachers.

- **Comprehensive Schooling and Examinations**

The 1944 Education Act promised secondary education for all, based on a tripartite system comprising grammar, technical and secondary modern schools based on selection at 11+.[10] But from the early 1950s onwards, there was a shift away from the measurement of IQ favoured by the psychological school towards the environmental school who believed that environmental influences rather than innate intelligence were paramount in shaping a child's educational potential. The policy to introduce a comprehensive system went beyond the education service itself, touching on social stratification, individual status and concepts of community (Kogan:1975).

Despite divided opinion both within and between political parties and between central and local government, there was a growing cross-party consensus that the bipartite system was unfair, divisive and condemned many academically able children to what was regarded as an inferior education. The theory of providing equal opportunity that would create a genuine meritocracy, in practice meant that middle class children had been the main beneficiaries of the selective system. Despite widespread reservations amongst politicians and academics about the 11+, grammar schools remained popular both with those who taught in them, and with parents who, despite purporting to favour comprehensives, favoured grammar schools for their own children.

The Labour Government's *Circular 10/65* 'requested' rather than 'required' local education authorities to reorganise secondary education along comprehensive lines, whilst formally declaring the Labour government's opposition to selection at 11+. No matter which party was in power between 1965 and 1981, the proportion of children attending comprehensives increased, despite a to-ing and fro-ing of policy and the responsibility for implementation resting with local authorities.[11] 'In 1971 only about 40% of children in British local education authority maintained secondary schools were in comprehensives; by 1981 this had risen to about 90%' (Walford:2001:46).

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[10] In practice, the system was only ever 'bipartite' since only a small number of technical schools were established.

[11] Benn & Simon (1970:39-40) pointed out that a problem associated with the early years of comprehensive development was where some local councils changed 'political hands' in the middle of planning for reorganisation, whilst others submitted patently non-comprehensive plans that had to be returned.

Yet, selection was never completely abolished and, according to Sally Tomlinson, during the 1970s

> '...advocates of selective education and traditional teaching made headway against the principles of comprehensive education and curriculum innovation, and the fragile consensus that non-selective education was the way forward began to crack' (Tomlinson:2001:19).

This, in effect, 'set the scene' for the New Right policies introduced during the 1980s that culminated in the 1988 ERA and, in terms of selection, have continued under New Labour whose policies have tended to continue to promote and allow selection on the basis of academic criteria:

> '...the final 'old Labour' paper unequivocally supporting comprehensive secondary schooling (Labour Party, 1994) was repudiated by...Tony Blair and his colleagues who subsequently encouraged new forms of selective schooling (and) abandoned any old Labour antagonism to private schooling...' (Tomlinson:2003:196)

The examinations associated with secondary education, in effect, retained echoes of the old bipartite system of education prior to the introduction of a new 'comprehensive' examination – the General Certificate of Secondary Education (GCSE) – in 1984. The Certificate of Secondary Education (CSE), introduced in 1962 had 'imposed a threefold division of O level pupils, CSE level and 'non-exam' children' (Tomlinson:2001:16).

The GCE and CSE curriculum and examination had been set in a framework with a degree of freedom for secondary teachers. However the GCSE, designed for an entire age cohort at the end of compulsory schooling, rather than simply representing an amalgamation of its two predecessors, was to be tightly controlled from the centre in terms of its curriculum content. It also provided the data with which to compare not only individual students, but also the results of their schools, LEAs and the nation as a whole in comparative league tables. 'The formative purpose of assessment waned in significance, and its role as a summative measure of performance became dominant' (Broadfoot:2001:142).

- **The 1988 Education Reform Act (ERA)**

This section will look at two specific policy areas that formed part of the 1988 ERA and that are, I will argue, of particular relevance to women teachers:

- The National Curriculum and Standard Assessment Tasks (SATs) and
- Local Management of Schools (LMS), Open Enrolment and 'Parentocracy'

The ways in which these policies may have been factors influencing the retirement decisions of women teachers will be discussed in Part 3 of this chapter.

- **The National Curriculum and SATs**

The so-called *Black Papers*, the first of which was published in 1969 by right wing critics of the education system, constituted a sustained attack on the associated concepts of comprehensive education, egalitarianism and 'progressive' teaching methods (Chitty:1989:50). During the 1970s there was widespread and growing concern, in both main political parties, about the education system in general, but in particular about the high degree of teacher autonomy and control in the domain of the curriculum.[12] There was intense media coverage of school crises such as that at the William Tyndale primary school in London, and the subsequent enquiry into the running of the school, and employers argued that comprehensive schools did not serve the needs of British industry. The Prime Minister called for a 'Great Debate' on education which 'marked something of a watershed in the post-war history of secondary schooling' (Chitty:1989:103). It emphasised some of the themes that evolved and developed through the 1980s, into the 1988 ERA, namely the need to make schools and teachers more accountable, and for a core curriculum[13].

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[12] The Prime Minister, James Callaghan, referred to the school curriculum in his Ruskin College speech in October 1976 as a 'secret garden.'

[13]The core curriculum argument had been advocated by Sir Keith Joseph at the 1984 North of England Conference in which he sought the establishment of a 'broad agreement about the objectives and the content of the school curriculum.'

The ERA was introduced after a 'derisory period' of consultation,[14] and despite the fact that 'replies were overwhelmingly opposed to most of the reforms, particularly the proposed subject-based structure of the National Curriculum' (Tomlinson:2001:40-41). The White Paper, *Better Schools* (DES:1985b) had not proposed a prescriptive curriculum, merely that a broad framework should be agreed on, but the ERA legislated for a highly detailed curriculum comprising ten foundation subjects, with three of them – English, Maths and Science – forming the 'core'. Primary education was redefined as Key Stages One and Two to be the subject of SATs at 7 and 11. Secondary schools would teach and assess Key Stages Three and Four at 14 and 16. But it was in the primary sector that struggle for control of the curriculum proved to be the major issue of concern.

> 'In this struggle for control, not only was the power of the teachers themselves to determine what was best for their pupils eroded, but the drift back towards an emphasis on the core curriculum, delivered in particular ways which were increasingly prescribed, became inexorable (Lowe:1997:169).

Since an overwhelming majority of primary school teachers were women, the impact of this policy was experienced disproportionately by them.

Denis Lawton stated that like many, 'perhaps most,' curriculum specialists, he was not opposed to the idea of a national curriculum but disliked some particular features of the version contained in the ERA (Lawton:1989:27). There was, however, widespread criticism of the policy for several different reasons. The teachers' unions felt that the curriculum had been prepared with too much secrecy, without adequate consultation and insufficient recognition of its complexity:

> 'Choose eight to ten "subjects,"...add tests at 7,11,14 and 16 for all pupils, publish the results for accountability and there it is! However, perhaps the issue is a little more complex than Mr Baker imagines' (Pettit:1988:10).[15]

The actual content of the curriculum was criticised as taking a too narrow, subject-based instrumental approach and the position of teachers, as agents in the delivery and implementation of the policy, was not given adequate consideration. Lawton argued that

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[14] A headline read: 'DES Postbag Fills With Disquiet' in *Times Educational Supplement* (9 October 1987), at the end of the few weeks allowed for discussion.

[15] The editorial in the same publication said, of the national curriculum, that its implementation would have 'major repercussions for the whole education service and for every teacher in every school.'

> '...there is nothing wrong with the subjects, provided they are treated as *means* and not as *ends*. Virtually all the enlightened views on curriculum planning are now agreed that subjects should be regarded as important only if they help to reach other objectives which, in turn, have to be justified' (Lawton:1987b quoted in Chitty:1992:49).

A further critique was that it was not a truly 'national' curriculum since its provisions did not apply to independent schools (Chitty:1992:50). These wide-ranging criticisms were an indication that those whose responsibility it would be to deliver implementation of the new curriculum would be confronting major changes not only in their day to day working lives, but also in their professional status. Furthermore, the policy in the primary context, aimed at raising standards through a curriculum largely modelled on conventional secondary school practice of separate subjects, appeared to be based on a 'profound misunderstanding of everyday practice in state primary schools' (Campbell:2001:35) and proved impossible in practical terms to fit into a finite amount of curricular time.

The new SATs strategy not only dramatically increased the paper-workload of teachers,[16] but the Task Group report that recommended publication of the test results also created deep concern amongst teachers and their unions. The type of test used enabled comparative assessments between individual children, between different school classes, and between schools both locally and nationally. 'In short, what is planned is a massive series of competitions, at all levels, based on test results' (Simon:1988:113), so the testing of eleven-year-olds at Key Stage 2, introduced in 1994, had selection as well as assessment implications.

During the 1990s, following highly problematic attempts to implement the curriculum policy, adjustments were made with the aim of ameliorating some of the difficulties that teachers had encountered. These were mainly associated with two issues: National Curriculum testing and the arrangements for Key Stage 4.[17] The Dearing Report (1994) reviewed the primary curriculum and proposed 'discretionary time' to be designated by schools, free of prescription, but this was only made possible by allocating less time to core subjects (in

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[16] Duncan Graham (1993:102) cites one headmaster who described the flood of documents associated with the National Curriculum as 'death by a thousand ringbinders.'

[17] 'The story of Key Stage Four is undeniably one of amendment, confusion and eventual abandonment' (Chitty:1992:52). By the end of 1990, pupils were allowed to 'drop' certain subjects, the most likely being music, art and physical education, and the development of vocational streams was encouraged alongside the more academic curriculum requirements. The reformed curriculum at primary level had led to superficiality in pupil learning and was undeliverable even by the most able teachers (DES 1993).

Phillips & Furlong:2001:36). But New Labour after 1997 not only retained 'an increasingly complex testing and assessment system' but also 'the media publication of league tables of examination passes by school, which usually demonstrated social class intake and superior resourcing' (Tomlinson:2003:197).

- **LMS, Open Enrolment and 'Parentocracy'**

The second major change incorporated into the 1988 ERA detailed here is the introduction of LMS. The Act made provision for the devolution of budgets for staffing, premises and services to individual schools, the budget to be determined by a formula reflecting numbers of pupils on the school roll. LMS was associated with two further policy changes. Firstly, an alteration to admissions regulations, which meant that schools would be required to admit pupils to their full capacity - the Open Enrolment policy - and secondly, the provision of different types of school, such as specialist schools and grant-maintained schools that had chosen to opt out of LEA control. Budgetary responsibility at micro level became that of the head and governing body of the school and, given that the vast majority of a school's budget is devoted to salaries and staff costs, such responsibility for appointments, contracts, promotions and incentive awards meant that 'heads (were) now the *de facto* employers of teachers' (Ball:1994:85). Furthermore, since budgets were linked to pupil numbers and parents had, theoretically, a more open choice of schools, heads were now in a market-driven relationship with parents. Ball identified a 'new headship' in which the context of key relationships with governors, the teachers and parents had been changed (Ibid).

The employer/employee relationship that LMS created changed the relationship between heads and teachers, and meant that the 'possibilities of colleagueship (were) constrained' and that the reconstruction of the head's role as 'budget manager, entrepreneur and promoter of the school' diverted him or her from educational to financial and managerial matters (Ball:1994:93). Although the 1988 ERA was largely a centralising piece of legislation, this particular measure devolved responsibility to individual school level. However, the effect of this for teachers was that, instead of decisions being made at a distance, they were now imposed from close at hand in a more personal way, a change that radically altered the relationships between different actors within schools.

The effect of these policies on teachers went further than altering their relationship with their school's head and governing body. The matrix of power had been changed and this had potentially far-reaching implications for the redefinition of teachers' work (Ball:1994:51). The balance of control moved from the teacher, or 'producer', to the parents or 'consumer' through policies such as Open Enrolment and *per capita* funding. And although these policies were adjusted and revised in subsequent years, the introduction of the market to the education system nevertheless reshaped and redefined roles within that system and, with it, the balance of power. The Department of Education & Science circular associated with the policy stated that:

> 'Local management is concerned with far more than budgeting and accounting procedures. Effective schemes of local management will enable governing bodies and headteachers to plan their use of resources – including their most valuable resource, their staff – to maximum effect in accordance with their own needs and priorities, and to make schools more responsive to their clients – parents, pupils, the local community and employers' (DES:1988b:3).

A DES press release (25 October, 1988) indicated that 'Headteachers, governors, LEAs and parents will all have a crucial role' with heads operating as managers 'of human as well as financial resources' (quoted in Ball:1994:62). But, Ball asks, 'where are the teachers in all this?' They were not included in the partnership, but were there as a human resource to be managed.

Understandably, LMS proved popular with head teachers. A study funded by the National Association of Head Teachers (NAHT) (Arnott *et al*:1992) found them generally positive particularly with respect to allowing schools to make more effective use of resources, though they were less keen on their time being taken up with administrative issues. (Whitty:2002:52). Levacic (1995) found opinion divided between heads, who welcomed self-management, and classroom teachers, who were more sceptical about its benefits (Levacic:1995:xi). This seems understandable given the shift in the power matrix discussed above.

Returning to the growing influence and power accorded to parents by the ERA, Ball argues that it marked the beginning of a change in 'institutional culture and in school-parent relations in the new operating context of the market' and a new kind of parental 'involvement' (Ball:1994:97-98).

> 'Choice, in reality only the right to express a preference, as many parents discovered when LEAs wished to direct children to specific schools, was the mechanism which made some schools richer and others poorer' (Tomlinson:2001:49).

Through LMS and open enrolment, individual schools had to attract 'customers' since funds followed the pupil and parental choice of school. Given their own budgets, schools could allocate funds to marketing in order to attract additional pupils and, therefore, extra funding. Parents became the consumers involved in educational decision making on behalf of their children in what Le Grand & Bartlett (1993) called a 'quasi market' in which the market forces present in education are mediated by the state.

In *The 'Third Wave': Education and the Ideology of Parentocracy,* Brown (1997) argues that we now have what he describes as educational *parentocracy,* where a child's education is

> '...increasingly dependent upon the *wealth* and *wishes* of parents, rather than the *ability* and *efforts* of pupils' (Brown:1997:393).

The diversification of secondary education - which now comprises City Technology Colleges, specialist schools, grammar schools and city academies in addition to comprehensives – has, in theory, extended parental choice:

> 'The New Labour government retained the Conservative faith in choice and competition, with education developing as a market commodity driven by consumer demand, fuelled by league tables of examination results, school 'choice' by parents, specialist schools and failing schools' (Tomlinson:2003:196)

Brown argues that this constitutes, in effect, an abandonment of comprehensive education in which market solutions have introduced *social selection by stealth* (original emphasis) since it is middle class parents who take advantage of 'choice' such as it is (Ball *et all* 1995; Reay:1998).[18] However, according to Stanley & Wyness (1999), in the context of relationships between teachers and parents and parental involvement in schools, 'the advantage seems to lie with the teachers, and parental empowerment seems to be something of a myth' (quoted in Coffey:2001:32). Furthermore, in a study of parent-teacher consultations, teachers presented themselves as having 'access to relevant

[18] The role of parents and social class is discussed again in the final section of Part 3 of this chapter – 'Social change: Pupils and parents as 'push' factors.'

knowledge about the student, and therefore the entitlement to exercise professional judgement about their prospects and problems' (MacLure & Walker:2000:21).

- **A new inspection regime**

The Education (Schools) Act 1992 and the Education (School Inspections) Regulations 1993 introduced major changes to the way in which external inspections are carried out in state schools in England and .Wales. The Act created the Office for Standards in Education (OFSTED), independent of the DfE, with a Chief Inspector appointed by the Secretary of State. It replaced the old system of a mixture of inspections by Her Majesty's Inspectors (HMI) and local education authority inspection. The declared aim of OFSTED was

> '...to improve standards of achievement and quality of education through regular independent inspection, public reporting and informed advice' (OFSTED:1994).

It marked a point at which the level of surveillance and audit of schools increased significantly, and was part of the growing focus on standards and accountability. Schools, and teachers within them, had always been subject to some kind of scrutiny but now they would be more strictly and stringently regulated, at four-yearly intervals, under a standardardised system. In addition to quality of education, standards achieved and financial management, the inspection included the spiritual, moral, social and cultural development of the pupils.

The discourse surrounding falling educational standards had its roots in preceding decades and led, inexorably, to the institution of a new, tougher inspection regime. It was designed to identify schools that were failing to provide an education that met the standards required by governments, both the Conservative administration that introduced the legislation, and New Labour who continued to support it after 1997. Following various 'panics' regarding failure of pupils, teachers and schools, a situation developed in which

> '...at one and the same time government is celebrating the raising of examination performances, while questioning the lowering of standards, and simultaneously arguing that pupils are leaving school without the 'right' skills, competencies and knowledges to function in a changing labour market' (Coffey:2001:9).

According to Clegg & Billington (1994) the inspection teams 'collect a range of evidence, match the evidence against a statutory set of criteria, arrive at judgements and make those judgements known to the public' (p2). And schools, when they have received that 'judgement', are required to devise 'action plans' on the basis of the inspectors' report and carry out changes and improvements as recommended within a specified time period. It is a linear model – 'inspect, report, plan, change, improve' (Woods *et al*:1997:119). The principle was to conduct the inspection in a systematic and formal way, to make recommendations, and to require the formulation of an action plan with the aim of bringing about school improvement through a process of change and adaptation. The use of a framework of measurable criteria, incorporating all aspects of the school, meant that comparisons could be drawn both within and between schools. This inspection strategy, together with changes already discussed, such as the introduction of a national curriculum, SATs and publication of test results, meant that league tables could be produced for every area of school life including, for example, truancy and exclusion rates covered by the inspection regime. This enabled politicians and 'consumers' to identify schools which were deemed to be 'failing' by 'naming and shaming' under New Labour's 'zero tolerance' of failure – failure 'in terms of (some combination of) accountability, management, teacher effectiveness, pupil behaviour, and examination performances' (Coffey:2001:10).

> 'Unfortunately, two-thirds of the schools initially labelled as failing were attended by the children of the poor, minority ethnic pupils and children with special needs, not wanted in schools attempting to boost their league table performances' (Tomlinson:2003:198)

Case *et al* (2000) argued that 'OFSTED's existence depend(ed) substantially on exploiting and...contributing to a complex nexus of 'victimisation' of the teaching profession' and that 'to be a positive vehicle of discipline, OFSTED must accentuate the negative' (p619).

From the teachers' perspective, it is generally acknowledged that forthcoming inspections cause the focus of their teaching to be diverted towards the actual inspection, especially since warning of an inspection can be given up to a year in advance. Woods *et al* found that, although implementation theory suggests that teachers have some room for manoeuvre in implementation of the Government's policy, 'OFSTED appears all-pervasive' at a time of 'increased bureaucracy, accountability, assessment and surveillance; and a decrease in control and choice' (Woods *et al*:1997:120). Nevertheless there were some

positive aspects to teachers' responses, such as recognising that the inspection afforded the opportunity for a good 'spring clean' and updating of policies and practices. However, Osborn *et al* (1997) cite studies showing that some teachers adopt a form of 'conspiratorial mediation' in relation to the inspections. Whilst they represent 'one of the most stringent attempts to control teachers' work, teachers in some schools have 'conspired' to mediate this by strategic compliance and impression management both before and during the visit in order to be seen by the inspectors to be complying with OFSTED criteria' (p63).

Having given an overview of a selection of significant education policies that affected all teachers, Part 3 of this chapter explores the way in which these policies impacted more specifically on women teachers, particularly those approaching retirement.

PART 3: EDUCATIONAL CHANGE AND WOMEN TEACHERS' RETIREMENT DECISIONS

> 'I've been appraised, inspected, observed, interviewed, chewed-up and spat out by all manner of experts telling me what to do ... I see people who are exhausted, who are insulted daily by the children in their care, and who know that they are not valued by anyone very much. I've tried, really tried, because I felt that teaching was a mission to help others but at the end of the day – teaching is just a b***** awful job' (TES:1998a quoted in McCulloch:2001:108).

This (male) teacher spoke for many in complaining bitterly about changes in the education system, changes that affected all teachers, not just women. Classroom teachers faced new pressures to implement changes that represented a radical transformation of their teaching role. Yet a great deal of policy discourse on education blamed teachers for poor education standards and the reforms were accompanied by 'swingeing attacks on the integrity of the teaching profession in general and the teachers' unions in particular' (Whitty:2002:64).

Many policies, such as the introduction of a National Curriculum with its accompanying emphasis on technology, had a differential effect on women teachers, particularly given the educational division of labour and the tendency of women to occupy lower status and part-time jobs. Osborn *et al* (2000) studied this differential impact in primary education, and

found that older women perceived themselves as having most to lose as a result of the reforms (p61). Part 3 of this chapter focuses on the impact of the educational policy changes on women teachers and their decision to exit the profession. It is divided into the following sections:

- Women teachers in the 1990s: education policy 'push' factors
- Teacher professionalism: autonomy, status and morale
- Women teachers' careers and the work/life balance
- The 'masculinisation' of educational management
- Social Change: pupils and parents as 'push' factors

- **Women teachers in the 1990s: education policy 'push' factors**

This section explores the potential of policies in areas of the curriculum, assessment, inspection and technology to act as 'push' factors in the premature retirement of women teachers. Associated factors, such as stress and workload will also be addressed.

There is considerable evidence to suggest that curricular and assessment reforms increased teachers' workloads and heightened their stress and anxiety levels (Campbell & Neill:1994; Pollard *et al*:1994). The increase in the administrative burden that accompanied the introduction of the National Curriculum and SATs was referred to by Sally Tomlinson as an 'avalanche of curriculum documentation, guidance, circulars and regulations' that descended on primary and secondary schools during the first years after 1988. In *Factors Affecting Teachers' Decisions to Leave the Profession,* Smithers & Robinson (2003) found that for teachers across all sectors, 'workload too heavy' was ranked the most frequent reason for leaving (pp49-50). 'Stress' and 'government initiatives' were ranked second and third. To compound the problems associated with these changes, the new policies were often at odds with teachers' own beliefs and led, during the 1990s, to high levels of stress and illness, a lowering of teacher morale, higher levels of premature retirement and a fall in recruitment to the profession (Ibid).

Although all teachers 'suffered from the pressures of new expectations and the problems associated with lack of clarity and frequent revisions of guidelines,' the impact of the

National Curriculum was felt most acutely in the primary sector (Acker:1999:173). Sandra Acker argued that, since primary schools are the province of female teachers, they were an 'easy target' and that 'almost all the pronouncements on primary school pedagogy were made by men, few of whom were likely to be intimately familiar with child-centred, topic-based practices' (op cit:172) and who, furthermore, were critical of its practice. Primary teachers were expected to teach a prescriptive curriculum across all subjects, a change which caused anxiety particularly about some elements of science teaching and technology, areas that may not have been part of a teacher's training (Wragg 1992 in Acker:1999:173). Furthermore, an overwhelming majority of the teachers responsible for beginning assessment when SATs were introduced were women.[19]

However there is evidence to suggest that teachers, in a relatively short time, grew to 'accept and even to like the National Curriculum' and that a survey of teacher opinion in 1992 showed that it was the reform that had done most to raise standards (Barber:1993:22). Regarding the experience of stress, Woods *et al* argued that those most at risk of it are

> '...those with strong feelings of vocation, those who care strongly about their work and their students. For these, the personal 'self' is inextricably bound up with the teacher role. They cannot switch off at the end of the school day to another life and another persona' (Woods *et al*:1997:146).

From a gender perspective, the impact of stress and increased workload associated with policy changes was significant for women primary teachers. Campbell *et al* (1991) found that infant teachers were 'overconscientious,' spending such vast amounts of time in extra preparation and marking that their health and personal lives suffered (in Acker:Op Cit). Furthermore, in looking for a fulfilling work/life balance, women may be shouldering traditional family and domestic responsibilities, working double or treble shifts of work, home and childcare, and are less likely than men to look after themselves as long as they feel that there are others who need to be cared for (Acker:1995:24).

In October 2002, a policy introducing significant extension of the use of classroom assistants as a means of helping to reduce teachers' workload, was announced. The proposal promised to transfer a total of 25 tasks, including locating absentees and

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[19] In 1990, 98% of infant teachers were women (DfES:1992)

invigilating exams, from teachers to classroom assistants.[20] The aim of this was to create time for marking and lesson preparation during the school day and the Government stated its intention, in the future, to re-write the teachers' contract to guarantee them a 'work-life balance' (Times:18.10.02). The proposal 'alarmed' teachers' unions who argued that the proposal to use 'untrained staff' undermined the status of teachers as an all-graduate profession, and would have preferred the alternative of transferring responsibility for bureaucracy to administrative staff.[21]

Problems associated with stress intensified with the introduction of OFSTED inspections, particularly in respect of their association with 'failure' and the imposition of a 'performance culture' (Campbell:2001:37). The criticism of primary culture in *Curriculum Organisation and Classroom Practice in Primary Schools* (Alexander *et al*:1992) was a seemingly personalised attack that became associated with Chris Woodhead, HMCI, who regarded primary professional culture as 'the problem'. The inspections themselves were a source of stress and anxiety, in particular through the policy of identifying so-called 'failing' schools: as Grumet (1988) had earlier put it, 'blame is deflected from the men who establish [the] policies onto the women who teach the children who fail' (in Acker:1999:172). Jane Miller has argued that 'constant surveillance and continuous legislation – and with minimal consultation with classroom teachers - is an indication of how little women are trusted to take responsibility for the system within which they work' (Miller:1996:9). However, many failing schools, in the 1990s as well as now, were in the secondary sector, where blame was less likely to be apportioned in a gendered way. And Gewirtz argues that blame for failure has, on the whole, neglected to take account of the part played by disadvantages in funding and what are, in effect, selective local systems of schooling (Gewirtz:1997:219).

However, during the years following the introduction of OFSTED, there have been many changes and adaptations made to the inspections of schools, largely in response to schools and teaching unions. *The Future of Inspections* (OFSTED, 10 February 2004),

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[20] The number of teaching assistants in maintained schools rose from 69,310 in 2002 to 95,460 in 2005 (http://www.dfes.gov.uk/rsgateway/DB/VOL/v000633/index.shtml

[21] Teaching unions were divided in their response with the NUT opposed and the NASUWT broadly in favour. Some non-teaching unions, such as UNISON also supported the arrangement being favourable for their members. The implementation of the policy has been fraught with problems, including strike threats over possible teacher redundancies and head teachers complaining of insufficient resources to implement the policy, which became law in 2005.

OFSTED's review of school inspection, responded to ongoing criticism regarding preparation time, and the paperwork and bureaucracy associated with inspections. It recommended a reduction in the time between inspections, making each one more of a 'short, sharp review' (p3), with less documentation, shorter duration and reduced financial burden on schools. The proposals also proposed shorter notification of an inspection leading to a more 'warts and all' (p10) view of schools. But for the prematurely retired teachers in my research, these proposals came after their exit from the profession, too late to ameliorate the effect of inspections as a potential 'push' factor.

The impact of technology is another area of educational change associated with the curriculum that has gender implications. There is broad agreement on the gendered nature of technology (Adam in Pilcher & Coffey:1996:150) and its pervasive introduction into the education system during the 1990s arguably had a greater effect on female than on male teachers. In addition, it is likely that there would be a differential age impact. So for older women teachers, the changes might have a double effect. But Yapp argues that, despite many voices arguing in the early 1990s that computers in education were a bad idea, like a production line, 'high productivity with technology is reflected in high-quality organisation' (Yapp:2002:187). Technology has had a profound impact on teaching and learning, both in the delivery of lessons, in what Mahony & Hextall refer to as 'a frenetic concentration on the 'technological fix' of ICT (Mahony & Hextall:2000:99), and in teachers' organisation and administration.

- **Teacher professionalism: autonomy, status and morale**

It is easy to see how and why teacher morale was deeply affected by policy change, whether or not it culminated in a decision to exit the profession. Teachers were demoralised and 'retired, hurt, from a career that had changed beyond recognition' (Independent 1995 quoted by McCulloch:2001:108). Indeed it is not only the number of changes, but also the speed with which they were introduced that is often cited as impacting on teacher morale. The reforms were accompanied by 'swingeing attacks on the integrity of the teaching profession in general and the teachers' unions in particular' (Whitty:2002:64). Sally Tomlinson argues that the 'de-professionalization' of teachers, where they have increasingly come under central control and been reduced to 'technician

status', was a 'major negative aspect of educational reform' (Tomlinson:2001:169). Others have characterised the reform process as one of re-professionalisation, adapting teacher professionalism to a new era. McCulloch has argued that during the 1990s there was a 'reformulation' of teacher professionalism that involved 'finding new accommodation or balance between the proper sphere of teachers' autonomy and discretion, on the one hand, and their accountability to the public, on the other' (McCulloch:2001:109). Michael Barber (1994) saw the 1993 Dearing Review as having the potential to establish a 'new partnership' between 'professional discretion' and 'public accountability' (in McCulloch:Op Cit:112).

In this changing context of teacher professionalism, and amid suggestions of greater fragmentation of the profession (Hanlon 1998 in Whitty:2002:64), Gewirtz has argued that 'ordinary' classroom (women) teachers, are exploited by those who manage them.

> 'Teachers' increasingly technicist work frees school managers for yet 'higher' work...Exploitation in schools, as in most other workplaces, is gendered...to the extent that women...tend to predominate in jobs with the lowest pay and status' (Gewirtz:2000:313).[22]

Some researchers have detected a heightened sense of professionalism amongst primary teachers (Campbell & Neill 1994) and a 'new professionalism and collaborative teaching culture' (Hargreaves 1994). But Gewirtz (Op Cit:317) states that 'enhanced professionalism was not a prominent feature' in her own 1997 study, nor was it in the teachers studied by Woods *et al* (1997). More recently, the *Survey of Teachers 2005* by the National Foundation for Educational Research reported that 'most teachers see the status of the profession as being at or below the mid-point of the five-point scale' (Sturman *et al*:2005:17). In this 'postmodern' state of teaching professionalism, in which there is fragmentation and diversity, perceptions are more individualised. The 'professional memories' (Ben-Peretz:1995) of teachers tend to highlight the freedom enjoyed in earlier years, and to forget the complexities and constraints. 'In some cases, this established the basis for a critique of current policies, contrasting the failures and disappointments of contemporary changes with an idealised version of the past' (McCulloch *et al*:2000 in McCulloch:2001:109). However Whitty argues that the formation of the General Teaching Council (GTC) in September 2000 may prove to be a turning point in bringing teachers together into a 'bona fide profession' (Whitty:2002:65). Tomlinson also suggests that the

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[22] Gender and promotion will be explored in greater detail in the following section of this chapter.

creation of the GTC 'notionally returned some professional control to teachers' (Tomlinson:2001:170).

New Labour, as part of its stated policy priority of 'education, education, education' has attempted to reinvent and re-position the idea of teacher professionalism by improving status, conditions and financial rewards for successful teachers (McCulloch:2001:112). In March 1998, the Secretary of State for Education and Employment declared that 'professionalism is back at the very heart of teaching' (Op Cit:113). In the Green Paper, *Teachers: Meeting the Challenge of Change*, the case was made for 'modernising the teaching profession' whilst acknowledging that the challenge of doing so would be 'immense' (DfES:1998:14).[23] The problems associated with recruitment were recognised, together with that of high wastage rates in the early years. But no mention was made of the 'high wastage rates' associated with teachers' early retirement.

- **Women teachers' careers and the work/life balance**

As Hilary Burgess (1989) pointed out, whilst teaching is a good *job* for a woman, it is a *career* with prospects for men (in Coffey & Delamont:2000:44). As discussed in Part 1 – The 'feminization' debate – a gender division of labour exists within the teaching profession and the number of women in senior teaching posts and headships is disproportionately low.[24] 'On the whole...women teachers remain clustered in lower, unpromoted ranks...often in particular (traditional/feminine) subject areas' (Coffey & Delamont:2000:45).

Two main arguments regarding women teachers and promotion are addressed here because in both areas it would appear that recent changes in education policy have affected women more than men. Firstly, women's commitment to promotion and career advancement has been called into question. Women's traditional and ongoing concern to balance family and working lives satisfactorily mean that the recent growth in paperwork

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[23] Modernisation has included the introduction of a new career structure for teachers, performance-related pay, improved management and leadership from headteachers who now have to undergo compulsory training and qualification for headship (Tomlinson:2003:200).

[24] See Appendix 2 for the percentages of all teachers and head teachers by gender.

and a period of 'thick and fast' policy initiatives make career aspirations arguably less, rather than more, likely:

> 'Sadly, some teachers now feel that they are so bruised by constant changes... A worrying number make it clear that they no longer wish to be promoted' (Bell:1996:11).

Secondly, school management has been perceived as being increasingly based on male models of leadership and discipline, thereby negating the skills and leadership qualities of women teachers. This argument is the subject of the next section – 'The 'masculinisation' of educational management.'

Central to women's decisions about seeking promotion is the priority of the work/life balance. In their study of primary school teachers' careers, Thornton & Bricheno (2000) found complex patterns and trends amongst female and male teachers indicating different areas of concern about, and influences on, their careers.

> 'It was found that, while reported reasons for not seeking or achieving promotion were multifaceted, the known and experienced disproportionate promotion of men, plus the frequent traditional gender differences in work – home orientation and contextual/situational expectations, contrived to limit career development for a significant number of women' (p187).

Whilst there was a connection between age, qualifications and experience for women, there was no such relationship for male respondents considering promotion. There was also a different pattern of career intention, with 80% of women with lower qualifications, but only 50% of men not seeking promotion, and for the highest qualified, 39% of women and 50% of men were seeking promotion (p192). It may also be true that for some married or partnered women, their husband's career is given priority and their own seen as secondary, to be combined with caring responsibilities of home and family.

Furthermore, it was found that 'the gender disparities identified frequently...reinforce gender stereotypes' with female respondents more concerned with family circumstances and stress, than men who focused more on government initiatives, power and status issues (p196).[25] Thornton & Bricheno themselves point to the increased workload for

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[25] A male respondent said of promotion that 'it was always a natural progression and what I set out to do. It seems that if you enter a profession you should seek to 'aim for the top". In contrast a female responded said she had 'no aspirations to the arduous responsibilities and personal sacrifices necessary to be a good head teacher' (p199).

primary teachers as a negative factor, and one female respondent suggested that workload is making promotion accessible only to those without family commitments, thus limiting it mainly to men, and excluding working mothers (p200). The additional training required, to gain the National Professional Qualification for Headship, now constitutes an extra pressure in itself, quite apart from the pressures of teaching itself.

Career breaks and the gendered nature of the appointments and promotions structures have also been cited as negative factors for women teachers (Thornton & Bricheno:2000:200-202). According to Coffey & Delamont (2000), 'most interview panels will have a majority male membership' and 'male dominance of the senior echelons of teaching and school management mean that the educational and career decision-makers are mostly men' (p51), although school governors, especially parent governors, do have a significant female membership. And as far as more informal aspects of promotion are concerned 'women may be less well plugged into networks that count (that is, 'male' networks)' (Ibid).

Whilst many women teachers do not seek promotion, or are less likely to than their male counterparts for the reasons given above, others do seek and gain promotion to headships: there is, therefore, not only difference between men and women, but also difference *between women* in the promotion process. In *Married women and career: career history accounts of primary headteachers*, Julia Evetts argues that

> 'the study of career biography enables us to make a theoretical link between the structural conditions in particular labour markets and the meanings of career to individual women (Evetts:1989:89).

The study explored how married women headteachers manage the constraints and opportunities of the primary labour market and discovered a variety of attitudes towards work and career. Almost a quarter of the sample had no children, and one of this group described herself as 'ambitious', 'successful and...proud of it' and felt that 'having children limits a woman's potential for a career' (Evetts:1989:96). And a study carried out in 2003 for the DfES found that 32% of the white female headteachers interviewed lived alone, compared to just 2% of their male counterparts (Powney *et al*:2003:47).

Not only are there differences in the promotion aspirations and achievements *between* men and women, but there are also differences *between women teachers.* This section has focused on promotion in relation to the work/life balance of women teachers: the next will look at the changing nature of educational management from a gender perspective.

- **The 'masculinisation' of educational management**

> 'A management ethos that values discipline, control and competition is often perceived as the model of management, predominant in education and schools. As such it is often conceptualized as a male model of leadership, with authority derived from an authoritarian approach' (Coffey & Delamont:2000:52).

Despite the teaching profession being predominantly female, the new evolving educational markets of the last decade are associated with masculinist management theories. The education system is, in effect, a highly regulated market with new managerial modes of control including systems of accountability, inspection and performance monitoring (Gewirtz:2000:309).

The introduction of policies such as OFSTED inspections, SATs, the publication of league tables, truancy rates, literacy and numeracy statistics, has created a performance-oriented culture in education:

> 'Headteachers are no longer partners in the process of educating pupils – they (have) become allocators of resources within the school, managers who are driven to ensure that the activities of employees are appropriate to the needs of the business, and givers of rewards to those whose contribution to the business is most highly regarded' (Sinclair *et al*:1993 quoted in Whitty:1997:305).

Whitty suggests that self-management has meant that governors and senior management teams are more clearly defined as 'management' and classroom teachers and other staff as 'workers' (Ibid).

It has been argued in the recent literature that the restructuring of the public sector in line with 'best commercial practice' has introduced its own version of masculinist management (Mahoney & Hextall:2000:118). Mahoney and Hextall cite the National Standards for Headship (TTA:1998c) as representing a 'hierarchical, individualistic, and somewhat heroic management model', and draw attention to the gender-biased nature of the language

described by an Equal Opportunities Commission officer as sounding 'like a battlefield'[26] (Op Cit:119). Leonard (1998) argued that the 'cultural shift' in education towards a market-oriented economic model served to exacerbate elements of educational management perceived as masculine (in Coffey & Delamont:2000:53).

So, do women in educational management adopt a traditionally male management style or develop their own distinctly feminised one? Diane Reay (2001) argues that

> 'the conflation of leadership with masculinity has significant implications for women in senior management teams and the ways in which they can (and do) manage' (pp159-160).

In addition to changes in education policy that may act as a deterrent to women seeking promotion, other variants are likely to include gender socialisation, the culture and ethos of the workplace and individual personality traits. Some studies have found that women in management roles act more like their male counterparts.

> '...as women move up the organizational hierarchy, their identification with the masculine model of managerial success becomes so important that they end up rejecting even the few valued feminine managerial traits they may have endorsed' (Kant:1993 quoted in Mahoney & Hextall:2000:120).

And Reay has suggested that, being a successful professional at the top of an institutional hierarchy involves, to some extent, a distinctly different femininity from traditional notions of being female (Reay:2001:161). One of the headteachers in the study described her management style on the continuum of masculinity and femininity as being 'somewhere in the middle...where the feminine and the masculine dovetail' (Reay & Ball:2001:162).

In a study of all female secondary headteachers in England and Wales[27], Marianne Coleman (2000) looked at leadership and management styles, and career progression to headship. Certain individual qualities are identified with 'feminine' or 'masculine' styles of management and both these styles may be adopted by men or by women, 'although the expectation is that men might adopt a style that is predominantly masculine and women one that is predominantly feminine' (p15). Coleman found that four of eight adjectives in

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[26] It includes terms such as 'lead by example', 'create and implement a strategic plan', 'personal impact and presence', 'energy, vigour and perseverance'.

[27] A survey of all 670 female secondary heads was undertaken and the response rate was 70%, well above normal response rates, and giving what the author describes as 'an objective measure of the interest that the headteachers had in the area'.

the masculine paradigm were identified by over half of the women headteachers as applicable to them which, she argues,

> '...tempers the picture of a pure feminine paradigm of management style...and indicates a more androgynous style of management' (Coleman:2000:16).[28]

However, one of the key findings was the continuing discrimination faced by women in educational management and, despite their experiences of discrimination, isolation, sexism and resentment, a majority identified ways in which being a female head freed them from male leadership stereotypes. Their arguably feminine leadership style was 'collaborative and caring', 'people orientated' with importance placed on 'power to' rather than 'power over' (Op Cit:26).

Although the marketisation and managerialism that emerged after 1988 were male-oriented (Ball:1990), women who have sought and achieved promotion seem not to have adopted a totally masculine style of management. Instead, they have melded their feminine traits with traditional masculine ones into an 'androgynous' style. However the proportion of women seeking promotion remains low in relation to men. Not only does this again point to differences *between* the categories of male and female, but also to the diversity and differentiation that exists *within* one gender.

- **Social Change: pupils and parents as 'push' factors**

The need to tackle the culture of classroom indiscipline and casual violence has been identified as an urgent priority by teachers, teachers' unions, inspectors and politicians. The main frustrations of teaching, as reported in the General Teaching Council *Survey of Teachers 2005*, are 'a lack of work/life balance, the amount of paperwork and the poor behaviour of some pupils' (GTC:2005:17). The problems associated with discipline and behaviour are the focus of this section.

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[28] A list of masculine and feminine qualities, identified by Gray (1989) was presented to the headteachers, who were asked to indicate which they felt applied to them. The feminine paradigm included 'caring', 'tolerant', 'non-competitive', and the masculine paradigm included 'competitive', 'disciplined', and 'highly regulated'. Each paradigm had eight elements.

'Poorly behaved pupils who disrupt classes make teaching extremely difficult and frustrating' (GTC:2005:9). Not only is poor behaviour a 'frustration' to teachers, it is also the reason given by a significant number of teachers for leaving the profession. A DfES commissioned study found that poor pupil behaviour was 'of great importance' in decisions to leave secondary schools, though less so at primary level (Smithers *et al*:2003:49). Indeed it was a significant exception to an otherwise similar pattern of 'push' factors found across both groups.

Exclusion from school became, during the 1990s, a way of removing seriously troublesome or difficult pupils from schools and was used with increasing frequency despite governments of both parties encouraging schools to keep exclusions down in order to reduce costs (Tomlinson:2001:101). A high number of children who are excluded experience a combination of personal (low self-esteem and behavioural difficulties) and family problems (relationship problems, social services involvement, violence or abuse among family members, criminality) (Hayden:1997 in Cooper *et al*:2000). Between 1991 and 1996, there was an increase of 400% in the rate of exclusions, and the problem of poor discipline became a focus of debate amongst politicians, teachers' unions and teachers themselves. Questions were asked as to why this was happening and, equally importantly, whose responsibility behaviour and discipline should be: the government, headteachers, individual teachers or parents?

Since 1988, education policies have given parents a more important and prominent role in a number of ways including so-called 'choice' of schools, input into the inspection process, governing bodies and greater involvement in terms of meetings and progress reports. But there is significant diversity between parents and the degree to which they seek to exercise choice and participate in the new partnership between parents and school:

> 'Choice is very directly and powerfully related to social-class differences, social-class divisions and inequalities' (Ball *et al*:1996:110).

Furthermore, Ball argues that 'skilled/privileged choosers' can reproduce their existing economic, social and cultural advantages in a complex hierarchy of schools, and Lareau suggests that, in an environment where teachers actively solicit parental involvement, 'middle-class parents, in supervising, monitoring, and overseeing the educational

experience of their children, behave in ways that mirror the requests of schools' thereby gaining an advantage over their working-class peers (Lareau:1997:714).

The result of this has been that some schools, particularly in disadvantaged areas, have large numbers of children from poorer families with few social, cultural or economic resources. Sally Tomlinson describes the attacking of so-called 'failing schools' as 'one of the cruellest and most pointless policies developed in the wake of the Education Act 1993 (Tomlinson:2001:74). The criteria for 'failure' in 'failing' schools include high levels of truancy, exclusions, and pupil disruption and, on the whole, these 'demonized' schools have been

> '...former secondary modern schools or comprehensives serving disadvantaged working class areas, whose heads, teachers and governors were held to be personally responsible for the underperformance of pupils' (Tomlinson:2001:74).

The introduction in 1998 of Education Action Zones was designed to develop programmes that help raise educational standards in deprived inner cities or rural areas. It involved the targeting of greater financial and human resources by involving local people and community organisations in a partnership, and such an initiative of 'positive discrimination in school provision is one that accords well with increasing equity between groups' (Walford:2001:54-55). The *Education and Inspections Bill 2006* seeks to give greater parental choice from an increasing diverse range of secondary schools and the description of schools as 'failing' has been changed to schools 'causing concern.'

Whilst the government has increased parental power and involvement in education, the blame directed at parents for problems related to behaviour and discipline has intensified. This teacher's comment, in the GTC *Survey of Teachers 2005,* is typical: 'Poor behaviour/lack of respect from a section of pupils, their parents, society as a whole – is much worse than it used to be even 5 years ago' (p9). On 2 May 2005, David Hart, general secretary of the NAHT, condemned irresponsible parents saying that classroom discipline is collapsing because children lack basic social training and arguing that giving parents greater powers over schools would be like 'putting an alcoholic in charge of a bar' (quoted in The Independent on Sunday, 8 May 2005). The same article quotes a teacher:

> 'It's a social disease. It's not just schools. It's a disease of a lack of respect. And that goes into every organisation and every institution' (Ibid)

She goes on to cite drugs as a major issue, 'not just the "wacky baccy" they can smell on the breath of the teenagers in class.' Other teachers have complained of 'low-level backchat', 'mobile phone texting in the classroom', and 'rude, crude, vulgar and obscene' behaviour (Independent on Sunday, 15 May and 19 June 2005). Teachers argue that there is a connection between the rise in disruptive behaviour and the lack of punitive sanctions available to them. Furthermore, there have been a number of high profile cases in which teachers have been accused of mistreating pupils when disciplining them.[29]

In *Learning to Behave: A Charter for Schools* (October 2005), the NUT called for new laws that clarify teachers' rights to discipline pupils and set them homework. Union leaders argue that legislation is needed to restore respect in the face of persistent disruption by a growing number of pupils. As far as the responsibilities of parents are concerned, they ask for their backing in the school's 'application of their behaviour policies and their system of incentives, rewards and sanctions' and ask them to insist 'that their children pay proper respect to teachers' (p9).[30] The Steer Report (2005)[31] highlighted the need for schools to have more effective disciplinary powers and sanctions in the context of increasing incidences of disruptive behaviour. Disciplinary and behavioural issues are now on the policy agenda. The *Education and Inspections Bill 2006* creates a power for staff to discipline pupils, extends the scope of parenting orders and contracts and promises to improve provision for excluded pupils.

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[29] It took 18 months for Welsh head teacher Marjorie Evans to be cleared of all the allegations of mistreating pupils at her primary school. She was convicted by magistrates, cleared on appeal, and then she faced fresh claims. Governors of the school ultimately decided that there was "no credible evidence" of wrongdoing. Teachers' unions argued that many teachers routinely have their lives turned upside down by similar allegations, almost all of which are subsequently proved to be unfounded.

[30] In Autumn 2005, the Prime Minister also announced his 'Respect Agenda' that, whilst not restricted to the educational arena, promoted the aim of improving respect in communities and in society as a whole.

[31] *Learning Behaviour: The Report of the Practitioners' Group on School Behaviour and Discipline.*

CONCLUSION

This chapter began by looking at the role of women in the teaching profession - at the 'feminization' debate in terms of number and ethos, and at the differentiation between women in the primary and secondary sectors. Part 2 detailed a specific and selective sample of education policies introduced during the careers of the teachers in this research, including the development of the comprehensive system, the reforms of the 1988 ERA and the introduction of a more stringent system of inspection. Particular aspects of these policies have been cited as factors influencing the early retirement of women teachers. These include excessive paperwork, inspections and poor discipline, particularly amongst secondary pupils. Recent policies designed to address these specific problems include the teachers' new workload arrangements,[32] *The Future of Inspections* (2005) which deals with some of the main criticisms levelled at the OFSTED regime, and the *Education and Inspections Bill 2006* which proposes a tougher disciplinary regime to tackle the problems associated with poor discipline and disruptive pupil behaviour.

The ways in which education policy changes have impacted upon women in the teaching profession in terms of potential 'push' factors towards career exit were then explored, firstly, in a general sense looking at changes during the 1990s, then, more specifically, at professional status and morale. The central issues of women and promotion in the education system – including the role of individual work/life 'choices' and the 'masculinisation' of management – were then analysed. The final section addressed the issue of social change in the context of educational reform, and the way in which changes in the behaviour and roles of pupils and parents have, potentially, acted as 'push' factors for women teachers towards an early exit from the profession.

Chapter 4 focuses on the methodology of this research and the methods used to gather and analyse the interview data.

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[32] See *The Education (Specified Work and Registration) (England) Regulations 2003.*

CHAPTER 4

METHODOLOGY & METHODS

'Women are never just women – they are old or young, mothers or daughters, black or white, partnered or unpartnered, employed in public life or employed at home...and all these positions or standpoints make for uniquely valid insights'[1]

INTRODUCTION

PART 1 - METHODOLOGY:

- Key concepts of feminist theory and methodology
- 3 'feminisms' (after Sandra Harding)
- Objectivity, subjectivity and epistemology within feminism
- Why adopt a postmodern feminist methodological framework?

PART 2 - METHODS OF DATA GATHERING:

- Why qualitative methods?
- Why semi-structured interviews?
- The data collection process
  - Interview design and structure
  - Pilot interviews
  - Sampling
    - The original sampling plan
    - The gap between plan and practice
  - Conducting the research interviews
    - Interview practice and reflexivity
- Ethical issues
- Data analysis

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[1] Gelsthorpe:1992:215.

INTRODUCTION

The advent of second-wave feminism in the 1970s criticised as androcentric scientific disciplines that were shaped by men and excluded and misrepresented women's lives and experiences. Feminist enquiry and criticism challenged the 'dichotomisation' of private and public in social research and exposed a need for research to be done on women and their lives rather than generalising the conclusions of research on men to generic 'people' (Epstein in Millen:1997:1).

This chapter is divided into two parts: Part 1 – Methodology, and Part 2 – Methods of data gathering, including data analysis.

In Part 1, I will

- outline the key concepts of feminist theory and methodology
- explore the 3 'feminisms' identified and described by Sandra Harding (1986): empiricist, standpoint and postmodern.
- focus on the central issues of objectivity, subjectivity and epistemology within feminism, given their fundamental significance and importance in feminist research, and
- explain the reasons for my adopting a postmodern feminist methodological framework for my research.

In Part 2, I will

- describe the methods of data gathering and analysis used in this research
- explain my choice of qualitative methods
- explore the reasons why I ultimately used semi-structured interviews in order to obtain the required data
- give a detailed explanation of each stage of the data collection process: the interview design and structure, the pilot interviews, sampling strategy and research interviewing.
- outline what I believe are the key ethical issues associated with my research
- describe the data analysis process

I will present the findings of my research in Chapters 5, 6 and 7.

PART 1 - METHODOLOGY

- **Key concepts of feminist theory and methodology**

The question 'what constitutes feminist social research?' has been an issue since the early 1980s. All 'feminisms' agree that much of social science research is 'malestream': that it is overwhelmingly 'social science on men, social science by men, and social science for men' (Smith:1998:311). In contrast, feminists developed an orthodoxy encapsulated in the phrase 'research on, with and for women' (Maynard & Purvis:1995:29) which implied the use of qualitative face-to-face interviewing and a rejection of quantification and its association with the philosophical doctrine of positivism and empirical methods of research. 'Feminists emphasised the importance of listening to, recording and understanding women's own descriptions and accounts' (Maynard & Purvis:1995:12). This was essentially a critique of what were regarded as 'masculinist' quantitative methods, particularly surveys and questionnaires, in which the researcher was 'detached' and engaged in collecting and measuring objective social facts via a value-free method of data collection. The feminist critique was rooted in the arguments of phenomenological sociologists who claimed that the assumptions found within questionnaires and interview schedules produced a 'falsely concrete body of data' which distorted rather than reflected the meanings of social actors (Maynard & Purvis:1995:11).

Feminist methodology emphasises the validity of women's personal experiences in contrast to the emphasis on scientific method of conventional research methods.

> 'To address women's lives and experience *in their own terms*, to create theory grounded in the actual experience and language of women, is the central agenda for feminist social science and scholarship' (Du Bois quoted in Hammersley:1992:188).

Hammersley argues that the importance of direct experience rather than method is associated with the idea that women have 'uniquely valid insights', but that whilst there is no doubt that those in different social locations will have different insights and cultural assumptions, all experience is a construction which carries 'a capacity for error as well as for truth' (Hammersley:1992:193). He argues against the idea of a specifically feminist methodological paradigm since it homogenises 'non-feminist' research and makes a

stronger connection than actually exists between political and philosophical assumptions and research decisions.

> 'All current forms of methodology can serve feminist ends if applied with a sensitivity to gender: all forms of methodology permit the research to contain an awareness of gendered politics and a critical awareness of the processes by which research is analysed and justified. The key issue now, the primary site of conflict, is the underlying epistemology present' (Millen:1997:10).

Detailed feminist critiques of social research have been built around issues of validity and epistemology rather than method itself.

- **3 'feminisms' (after Sandra Harding)**

The development of feminist approaches to knowledge construction have been important in helping social scientific practice to recognise the role played by power relations in social orders and to give more careful consideration to, and reflect more closely upon, the role of values and norms. In *The Science Question in Feminism,* Sandra Harding (1986) identified three feminist tendencies towards generating new theories of knowledge - feminist empiricism, feminist standpoint and postmodernist feminism – which will now be considered.

Feminist empiricism (FE) 'tries to find a way of holding on to the aims and objectives of the scientific method without falling into the problems involved in androcentric social science' with the key question being: how do we overcome male bias in social research? (Smith:1998:313). FE argues that the culture of research must be changed to include more women in positions of authority in research communities. Central to empiricism is the principle that facts and values should be separate, yet in malestream social science, androcentric values and assumptions are presented as an objective account of the social world, and the principles of empiricism violated (Ibid). However, Harding argues that a key problem with using the methodological rules of empiricism is that research in which the focus is on the context of discovery is not considered 'real science' since it is seen as value-laden. In contrast, the focus of scientific research is on the context of justification in which hypotheses can be subjected to rigorous testing eliminating social values and leaving only pure facts (Harding:1991:141-2). As Stephen Jay Gould wrote, 'Science,

since people must do it, is a socially embedded activity' arguing that claims that science is an objective enterprise are a myth (Gould:1997:21-2)

Feminist standpoint (FS) theory draws on Marxist ideas about the role of the proletariat to suggest that women are an oppressed, exploited class, and to argue for emancipation and a transformation of social relations based on social research 'on, by and for women'. Standpoint feminists argue that 'social scientists should take the "standpoint of the oppressed" as a basis for constructing "objective knowledge"' (Smith:1998:315). There is a strong link with the realist approach to knowledge construction in that it places emphasis on the relationship between social structures and the way we think and act within them (Ibid). It is a response to the patriarchal statement that women's experience is an invalid basis for knowledge, and instead argues 'that it is in fact a more valid basis for knowledge because it gives access to a wider conception of truth via the insight into the oppressor' (Millen:1997:11). Harding argues that a feminist standpoint is not something anyone can have by claiming it, but rather it is an achievement gained by engaging in the intellectual and political struggle needed to see nature and social life from the point of view of women's social experiences instead of from the perspective available from the 'ruling gender' experience of men (Harding:1987:185).

Postmodernist feminism (PF) incorporates many different viewpoints and objectives, and ought not to be understood as homogeneous. It is the ultimate acceptor of diversity: multiple truths, multiple roles, multiple realities are all part of its focus. Like other postmodernist positions, it is critical of grand universal theories and focuses instead on fragmentation, pluralities, multiplicity and difference, on the complex and diverse experiences of all women. Many postmodern feminists make their own use of Derrida's concept of *différance* – 'the inevitable, meaning-creative gap between the object of perception and our perception of it' (Tong:1989:223). In PF there is no single unitary method, nor is there a universal basis for women's experience in direct contrast to standpoint approaches in which there is a definite and universal experience for all women rooted in patriarchy. This creates a somewhat uneasy relationship between these two feminisms and, arguably, threatens the unity of the feminist movement.

Instead of privileging feminist standpoint, PF suggests that there are a variety of contradictory and conflicting standpoints, none of which should be privileged.

> 'There is no point in trying to construct a standpoint theory which will give us a better, fuller, more power-neutral knowledge because such knowledge does not exist' (Millen:1997:12).

Whilst FS strives to provide an overarching explanation and solution for women's oppression and emancipation, and a political strategy for social change, the emphasis of PF lies, instead, on pluralism, complexity, difference and diversity, with attention directed towards the relationship between the 'sexist, racist, ethnocentric, classist and heterosexist discourses which are involved in the formation of gender identities' (Smith:1998:318). Linda Nicholson argues that PF must not 'violate recognised political mandates of feminist research' (quoted in McLennan:1995:407) but 'postmodernism *does* violate those mandates simply by pluralising the number of such mandates and by ruling out any epistemic 'privileging' of some mandates over others' (McLennan:1995:407). PF 'exposes the tension at the heart of feminist research most acutely' (Millen:1997:12).

- **Objectivity, subjectivity and epistemology within feminism**

The objectivity/subjectivity debate is central to feminist social science research. It questions, and is critical of, traditional notions of 'objectivity'. 'The dominant epistemologies of modernity with their Enlightenment legacy and later infusion with positivist-empiricist principles, have defined themselves around ideals of pure objectivity and value-neutrality' (Code:1993:16). But is 'pure objectivity' really possible? The positivist social sciences were remarkable 'for their ability for translate their own cultural values and prejudices into objective facts' (Smith:1998:53). Objectivity could be achieved by standing back and taking a disinterested approach 'not tainted by values, interpretations, perspectives' (Hollinger quoted in Smith:1998:72). It was Wilhelm Windelband who first distinguished between the study of natural objects and studying the social world. He argued that in the natural world, objects remain constant, making it possible to establish general laws, but in social sciences the objects of analysis were other subjects. Furthermore, the researcher's own values and interests were recognised as playing an important part in studying a 'unique configuration of events' (Ibid:141). Ideals of rationality and objectivity have been constructed in a context which largely ignores the experiences and characteristics of femaleness, which, in effect, means that

> 'ideal objectivity is a generalisation from the *subjectivity* of quite a small social group, albeit a group that has the power, security, and prestige to believe that it can generalise its experiences and normative ideals across the social order' (Code:1993:22).

There is a close connection between the development of scientific rationality (and the tendency to substitute male rationality for all forms of human knowledge) and the exclusion of women from scientific research institutions – 'if science could tell us its story, it would have the voice of a man' (Smith:1998:55).

In '*Taking Subjectivity into Account'*, Lorraine Code suggests that any conversation that starts: "Science has proved...." implies reliability on the basis of presumed objectivity and value-neutrality, and that the facts can stand up to scrutiny because they are the result of a 'disinterested process'. However she argues that such ideals are 'inadequate to guide epistemological debates about contentious issues...and that it is deceptive and dangerous to ignore questions about subjectivity in the name of objectivity and value-neutrality' (Code:1993:27) – 'Objectivity *requires* taking subjectivity into account' and does not entail abandoning objectivity (Ibid:32). Standpoint feminism embraces the idea that objectivity should involve critical scrutiny of all evidence included in the research process. Sandra Harding argues that 'conventional notions of objectivity are 'weak' because they include the researchers' hidden and unexplicated cultural agendas and assumptions' (Harding:1998). She advocates a 'strong objectivity' that includes a close examination and inspection of these hidden elements 'and transforms the reflexivity of research from a problem into a scientific resource' – in other words 'strong objectivity' requires 'strong reflexivity'. Moreover, Du Bois argues that a rejection of the notion of 'objectivity' and a focus on experience in method does not mean a rejection of the need to be critical, rigorous and accurate (in Gelsthorpe:1992:214) – rather it can mean making interpretative schemes explicit in the concern to produce good quality knowledge (Ibid:215).

'Feminist objectivity means quite simply *situated knowledges*' (Haraway:1996:253), and whilst the three main feminist approaches are broadly in agreement that Western rational knowledge has been androcentric, there is some disagreement as to how objective knowledge is constructed. Standpoint feminists have argued that all knowledge is situated and 'reflects our social experience, our understanding of our interests and our values; that objectivity seen in terms of political and personal disengagement and value-

neutrality is neither possible nor desirable (Strickland:1994:265). Harding has argued that it is not only desirable, but also possible to have what appears a contradiction in terms – socially situated knowledge – and points out that in conventional accounts, socially situated beliefs only get to count as opinions (Harding:1993). For standpoint theorists, the powerless are those with epistemic legitimacy, even if they lack the power that could turn that legitimacy into authority (Longino:1996).

In contrast, PF epistemology recognises no single unitary method, nor a universal basis for all women's experience. 'There are no universals in the world or in the way we construct knowledge about the world' (Smith:1998:316). Ideas of science, reason, progress and emancipation in FS were replaced, in PF, by an emphasis on pluralism, complexity, difference and diversity. Postmodern feminism

> 'points out that feminist standpoint epistemology's apparently radical critique of both feminist empiricism and the mainstream is compromised' because 'feminist standpoint epistemology is caught between its continuing aspiration to a better, more wholesome grounding for knowledge (via women's experience), and its recognition of the necessarily partial, profane and fragmented nature of all knowledge discourses. For postmodern feminism, it is the latter conception that must be embraced, and all notions of epistemic grounding or unity must be jettisoned' (McLennan:1995:392).

PF knowledge construction draws upon post-structuralist ideas of discourse and cultural differences, concentrating on 'the way in which cultural identities are the complex and unstable product of articulatory practices' (Smith:1998:320). PF also draws on Foucault's genealogical method to explore the ways in which discourses change in different social and historical situations, and the recognition that there can be a number of different discourses, each telling its own story, about the object in question.

Postmodern feminism presents a major challenge to feminism as a unified whole, and has been widely criticised for abandoning the intellectual and political aims of standpoint feminism that may lead to disintegration of the feminist movement. However it has also been argued that there is little to lose and much to gain from the postmodern feminist 'celebration of multiplicity' (Tong:1992:233). Postmodern feminists

> '...should encourage us to tolerate, invite and interpret ambivalence, ambiguity, and multiplicity, as well as to expose the roots of our needs for imposing order and structure no matter how arbitrary and oppressive these may be. If we do our work well, "reality" will appear even more unstable, complex, and disorderly than it does now' (Flax:1990:183).

- **Why adopt a postmodern feminist methodological framework?**

I used postmodern feminist methodology to explore the professional and private lives of women teachers, and to investigate the factors that influence their decisions about early retirement from the teaching profession. I did so using both positive arguments in favour of postmodern framework and negative ones opposed to a standpoint feminist approach.

Firstly, my research is about women as social actors, and whilst feminism is not the only theoretical framework that can be used in research on women, I believe that given the nature of my enquiry – qualitative analysis of data collected from in-depth interviews - a feminist approach was the most appropriate. Although quantitative methods are used in feminist research, it is 'still the case that not just qualitative methods, but the in-depth face-to-face interview. has become the paradigmatic 'feminist method" (Maynard & Purvis:1994:34).

My reason for adopting a *postmodern* feminist methodological framework was that it is based on concepts of

> 'diversity rather than unity, difference rather than synthesis, complexity rather than simplification, unique rather than general, intertextual relations rather than causality' (Rosenau:1992:8).

Whilst there were certain commonalities – for example, gender, age and profession - between the women in my research sample, during the course of my research I discovered wide-ranging diversity in their individual life histories both in a public and private context. I therefore decided to use a theoretical framework and interpretative paradigm within which to analyse and explore this diversity and heterogeneity and, for this purpose, a postmodern feminist methodology was appropriate.

Feminist discourse has, I believe, a tendency to be asymmetrical. 'Much research is on the poor, the disadvantaged, the deviant and the oppressed' (Shipman:1988:117) and feminist research, in focusing on the plight of the disadvantaged, the disaffected, the uneducated has given relatively less attention to exploring the experiences and material realities of women considered 'privileged'. Harriet Bradley has argued that despite a 'growing polarization in the experiences of managerial and professional women and their

less privileged sisters' both groups of women experience gender discrimination in the workplace (Bradley:1992:216). However, it should be remembered that not all *theoretically* oppressed women actually *feel* oppressed. This research suggests that there are many versions of social reality, all of which are equally valid.

> 'Women's lives, women's bodies, women's experiences, demonstrate that the social...world is complicated. 'Reality' is shown to be multidimensional and multi-faceted' (Stanley & Wise:1993:183).

One of my reasons for not using a standpoint feminist framework is related to the fact that I do not regard women teachers as an occupationally oppressed group in that they are professional career women: I agree with the assertion that 'women are not uniformly downtrodden' (Millen:1997:2). Hence I do not propose, as standpoint feminism would imply, either to make the central goal of my research 'the emancipation of women, rather than the production of valid knowledge per se' or 'to claim that the truth can only be discovered in and through the struggle against women's oppression' (Hammersley:1992:190).

Against this background, this thesis takes as its case study the experience of women teachers. The gender/class nexus is complex but I believe that what seems to be an overwhelming interest in working class women would suggest that there is a category of professional women to whom the problem of patriarchy does not apply.[2] I wish to explore whether or not this group of so-called 'privileged' women is indeed free from the confines/dictates of patriarchal social structures. I am interested in this not only in the context of work-life balance in which husbands and partners may influence women's retirement decisions, but also from an education policy perspective. The changes regarded as most significant in terms of impact on teachers' working lives, identified in my research interviews, were introduced by male ministers and made law by a male-dominated parliament.

In Part 2, I will describe and explain the process of data collection and analysis.

PART 2 - METHODS OF DATA GATHERING

- **Why qualitative methods?**

My reasons for using qualitative methods, specifically semi-structured interviews, and the way they worked in practice, will be explored in more depth and detail through the following sections on sampling and interviewing. Here I wish to suggest that through qualitative research it is possible to explore a multiplicity of dimensions of the social world in order to gain understanding of the experiences of research participants and the significance of the meanings generated. This can be achieved by using methods that

> '...celebrate richness, depth, nuance, context, multi-dimensionality and complexity rather than being embarrassed or inconvenienced by them' (Mason:2002:1).

Qualitative research has the capacity to develop compelling arguments about how things work in a particular context. Based as it is on methods of data gathering that are flexible and sensitive to the context in which the research takes place, it seems well suited to my research, both in terms of the social actors, women teachers, involved and the context of the study. Critics point to an anecdotal or illustrative nature of qualitative research, but this approach fails to acknowledge the 'strategic significance of context in the development of our understanding and explanations of the social world' (Ibid). Qualitative research can indeed be anecdotal if carried out with insufficient rigour, but this is not because it is qualitative: quantitative research can also be non-rigorous.

- **Why semi-structured interviews?**

> 'Whatever the label used, the informal interview is modelled on the conversation and, like the conversation, is a social event with, in this instance, two participants' (Holland & Ramazanoglu:1996:135)

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[2] For exceptions, see Crompton & Harris:1998, Araujo:1994, Billingshurst:1996, Millen:1997.

For the purposes of my research, semi-structured interviews with women teachers were used

- to describe events as they exist for the interviewees in the context of their personal and working lives
- to identify causal relationships and connections between life events and choices, and
- to explain the decisions made as a result of them.

The main advantage of this method is that it implies a degree of standardisation of questions, within a broadly defined agenda, coupled with a degree of opportunity for improvisation and flexibility for the interviewer. It is detailed, probing and exploring, and not merely information gathering. The interviewer is, in effect, in charge of the development of the interview and can therefore govern the pattern of (non) interventions (Wengraf:2001:63). Such interviews have to be planned and prepared for, but what is planned is often a deliberate half-scripted or quarter-scripted interview where the questions are only partially prepared in advance and will be improvised by the interviewer (Op Cit:3).

There were many issues in this research that could not, I believe, be covered in such depth, and in such an effective way, using structured interviews or quantitative methods. For example, the 'push' and 'pull' factors that influence the work/family balance during women teachers' working lives are central to decisions regarding leaving the profession for alternative work, or to retirement.

> 'Teachers do not follow the same occupational career path, nor are their lives necessarily similar in other respects – each has their own idiosyncratic biography' (Sikes:1985:29).

The semi-structured interview allowed the interviewee to talk more freely about factors influencing her decision-making processes. However, particularly with regard to the 'push' factors associated with recent education policy developments, I needed to be careful that my questions did not direct the subject's memory towards specific policies as 'problems'. There is a tension between the education policy 'push' factor and the participant's own recollection – another possible instance of selective memory in describing present feelings about past experiences.

As far as work-related 'pull' factors are concerned, many women need to work because of financial commitments, often exacerbated by a change in marital status such as divorce or separation. Paid employment represents the means to an independent life: loss of economic independence on leaving paid work may constrain many women's retirement options. Many women also enjoy the social and psychological aspects of working, particularly in improving self-esteem and gaining personal fulfilment, and unfulfilled ambitions and career goals may also influence the decision to retire. For women whose career trajectory has been delayed or interrupted by prior caring commitments, this may mean that they are reluctant to exit (Mann:2001). I decided to interview women who were still teaching as well as women who had already retired because I hoped that this might help me to find answers to the key question of why some teachers stay in the profession. This is equally as important in this study as the reasons for their leaving, which may simply be about it being better <u>not</u> to work. 'Interviews can also be used to examine non-motivations, why people do not do certain things' (Gilbert:2001:125).

Because there were myriad factors that may have influenced the retirement decisions of these women teachers, a flexible approach was important in this research. The project design could not be set in stone but instead took shape gradually as data were gathered. As themes emerged, the method employed needed to be one that could be adapted as part of a continuous reflexive process leading to the final design (Dillon:1990).

There are however, some ways in which qualitative methods, and semi-structured interviews, are regarded as potentially problematic, and I will now outline some of these critiques and the reasons why I believe that they were either overcome or not relevant in the context of this research.

One of the potential weaknesses of using qualitative methods is that of generalisability. In the findings from my data, it is not possible for some areas of questioning to produce statistics stating that x% of the teachers interviewed retire early because of factor y. Nevertheless, it is possible to generate statistics from some of the lifecourse data as well as to look at the qualitative data in the context of quantitative government statistics and national trends. According to Denzin & Lincoln,

> '...bureaucrats and policy makers...seem to prefer aggregated numbers about certain social conditions, and for their needs generalizability seems to make sense' (1994:217).

For anyone interested in questions of meaning and interpretation at a more individual level, traditional thinking about generalisability is arguably less important: it is the uniqueness of each case that is of value to the study (Schofield in Hammersley:1993).

> 'Issues of consistency also arise because shortage of space means that many qualitative studies provide only brief, persuasive, data extracts through the interpretation of interview transcripts' (Silverman:2001:33).

Some elements of my findings are, I believe, generalisable, particularly in terms of the teaching profession and/or education policy, whilst there are other 'unique' findings, such as those relating to the individual circumstances of each teacher as a woman.[3]

How far an interviewee is allowed to 'stray' from the focus or topic of the original question can be problematic. Ideally, the interviewer should ensure the inclusion of specific factors that are relevant to the research question, whilst not encouraging (or allowing) the telling of an entire life story! With the help of an interview schedule with relevant prompts, I tried to minimise the problems associated with selective memory and the re-writing of individual histories. Most people probably have a tendency to do this so there is an inevitable tension between qualitative research and the idea of an objective 'truth'. The validity of results obtained in interviews can be influenced by the inadequate memory, mistakes, lack of relevant knowledge and untruthfulness of the interviewee. Furthermore I think that greater reliability was achieved in introducing a more structured interview format, since this enabled greater completeness and comparability of the answers given, together with some degree of quantifiability of the results. Although comparability is possible using unstructured interviews, semi-structured interviews enabled me to make comparisons between responses and to engage in a broader analysis appropriate to my research project.

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[3] The findings presented in the following three chapters show that whilst there are some data that reflect trends indicated in the literature, there are also data that demonstrate individual perspectives with unique insights that suggest the diversity between the teachers interviewed.

- **The data collection process**

  - **Interview design and structure**

In *The Practice of Questioning*, Dillon (1990) suggests that there are three key stages to the interview process – preparation of questions, putting the questions and pondering the questions-answers (p164). Firstly, then, there is 'forethought' in which I looked at the purpose and formulation of the questions to ask. The researcher needs to constantly be recalling and specifying the purpose of his/her particular research in order to know which questions to ask and why. Dillon proposes looking at the answers first: What is it that I want to know? What kind of answer do I need?

> 'It is an answer dance, a *pas de* deux, whirling about answers while twirling out questions to achieve purpose in circumstance' (Dillon:1990:168).

My interviews were designed to provide data that

- describe women teachers' experiences of balancing work and family responsibilities, of the interplay and changing balance of these areas during their life-course;

- identify what these women regard as the significant 'push' and 'pull' factors influencing their retirement decisions and choices and

- explore the reasons why some women have already left the profession either to change careers or to retire early and why some have stayed in teaching.

To this end, I conducted my interviews and research with what Maria Mies describes as 'conscious partiality' (Mies in Bowles & Klein:1983:122).

The three areas of questioning into which the interviews were divided, and which reflected the three main themes of my research, were as follows:

- Questions about the individual's life-course asking about personal factors such as family circumstances, caring obligations and responsibilities and financial aspects of their lives such as whether they were part of a dual-income household, or a sole breadwinner. Their situation may well have changed during the course of their working lives, and not only is their past position important to this research, but also the ways in which factors such as their perceptions and anticipation of caring commitments in the future might shape their retirement plans. Another central aspect in this area was the issue of career breaks and moves, and, in particular, the influence these may have had on promotion and career development – the impact of the personal on the professional.

- An exploration of their working lives including changes in their day-to-day work and role as a teacher, professional status, and the education system which may affect or influence their job satisfaction and hence decisions regarding retirement. During the course of their working lives, these 'baby boom' women have, as discussed in the previous chapter, experienced numerous far-reaching changes in the education system that have potentially had an impact on their day-to-day lives, both inside and outside the classroom.

There have also, during this period of time, been significant changes more widely in society. Both parents and pupils today are very different from the way they were when these teachers began their careers. Teachers have to deal with issues such as drug-taking, bullying and general disciplinary problems, and may themselves be the victims of abuse from both pupils and parents. This section was added following my pilot interviews, in response to its evident relevance, as part of the process of reflexivity.

- If the interviewee had not yet retired, questions in the third section focused on individual perceptions of retirement and how these linked with their current view of their professional role. At the same time, the questions were designed to try to gain insight into the reasons why they might 'choose' to retire if the opportunity arose, or discover any circumstances under which they would feel there was no other option. This section included questions regarding their degree of financial

preparedness for retirement, and whether they had considered part-time/flexible retirement including supply teaching.

If the interviewee had already retired, questions addressed why she had retired early. Had it been a proactive, planned decision, a 'choice', or was it a case of redundancy, ill health, or some other external pressures? They were also asked how they had spent their time since leaving the profession. This section included questions about whether or not they had continued to teach, for example in supply teaching or tutoring, since giving up a full-time contract.

The questions on retirement decisions and choices were different for retired and working teachers given that, for one group, it was a process that they had already experienced: questions on the lifecourse and teaching careers were the same for both groups.[4]

In planning the interview structure, I gave careful consideration to the order in which I would ask the questions. With arrangements for order made in advance, it is possible to 'keep in step and even ahead of the game' (Dillon:1990:170). In theory, any principle of ordering could be adopted, but I decided that there was a good argument for using 'interest' ordering. I started with an 'easy' introductory question about why teaching had been chosen as a career and followed up with the section of questions about education policy and social change. Being something of a 'hot' topic, I found that this had the desired effect of 'getting the interview going', encouraging the interviewee to be forthcoming and relaxed, and warming to a favourite theme! I ended the interviews with questions about retirement that seemed a suitable way to 'wind down'. Given the semi-structured format, this order was not necessarily rigidly adhered to if it seemed appropriate to use a more flexible approach in response to answers given, thus allowing for tangential exploration.

Only one question was inserted in a random way, and was deliberately disconnected from other similar questions. This related to 'change' asking the interviewee's attitude towards change, in a general sense, and was not asked at a point in the interview when other questions on structural or social change were asked. My reason for doing this was to try to establish whether a particular individual found change difficult to adapt to in some or all

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[4] See Appendix 8: 'Interview questions – Working teachers' and Appendix 9: 'Interview questions – Retired teachers.'

areas of life. I saw this as a 'control' question and checked responses against those to earlier questions on change in a different context.

So how did 'plan' and 'practice' operate? Were the outcomes as expected? First of all, the questions were tried tested in pilot interviews.

- **Pilot interviews**

Pilot interviews were conducted, as a safeguard, in order to test my planned questions in advance. I recruited two contrasting subjects for these interviews. One was, at the time, an assistant head of an urban comprehensive school who was taking early retirement because of the forthcoming closure of her school. The other was teaching in a primary school in rural Dorset. The contrast between them in terms of their working day and the problems they faced was significant and so, unsurprisingly, were their responses. Two important changes came from this piloting experience.

I had planned to use unstructured interviews - biographical methods - which are particularly well suited to life course research, and which emphasise individual personal history in understanding the choices that people make, and the decisions which structure their lives (Chamberlayne, Bornat & Wengraf:2000). Life histories focus on the experiences of individuals and their thoughts and feelings at different stages of their lives. They can tell us about life's passages and can also provide a window on social change (Rubin & Rubin:1995). In order to achieve this, I originally designed an interview guide with a list of areas of questioning to be covered, whilst leaving the exact wording and order of questions to develop in the course of each individual interview, and I considered that this method would work well in exploring the individual life course factors affecting women teachers' retirement decisions.

The first change was to introduce more structure into the interview design and to conduct semi-structured rather than unstructured interviews. One reason for changing from my original plan was a pragmatic one. I conducted my two pilot interviews and my first two research interviews using minimal structure, allowing for the time and space to develop individual relevant threads of potentially valuable data. However, despite the interviewees

being articulate, good communicators, they tended to give relatively brief answers, not taking the available opportunity to answer in depth and detail. Since I found it necessary to use prompts to elicit the more detailed information I required, and that would otherwise not have been forthcoming, I decided to employ a more structured interview schedule and prompting strategy for my remaining research interviews.

Secondly, the pilot interviews afforded me the opportunity to check for feasibility and to assess the time it would take to conduct each interview and I felt that the interview questions as originally planned were too numerous and, therefore, the interview too long. I was aware that my sample population, particularly those groups still working full-time, would have little 'spare' time and I wanted to achieve an appropriate balance and fit between the need to cover all aspects of my research whilst respecting the existence of certain time limitations. This led me to focus on the relevance of each question to the research, and to a 'pruning' of some that seemed less relevant. I also decided to add questions regarding the role played by partners/husbands in retirement decisions, since the pilot interviews informed me that they were important. Furthermore, on the subject of the actual questions asked, it was important to ensure the suitability of questions and my interviewees' understanding of them. 'Without any pilot stage, the actual research is likely to address unsuitable questions to bewildered people' (Shipman:1988:91). Although my pilot interviewees never seemed 'bewildered', the process of piloting was, nevertheless, a valuable one both in focusing the interview questions and practising my interviewing skills.

- **Sampling**

The aim of sampling in qualitative research is to obtain detailed accounts from a group of participants who will enable the research questions to be thoroughly explored and ultimately answered. It is usual to use small sample sizes and to make a purposive sample selection, rather than an arbitrary or self-selecting sample, in order to encompass the relevant dimensions of the research. Since there were four groups of women teachers whom I initially hoped to interview, I aimed to achieve a quota of approximately equal numbers in each category.

- **The original sampling plan**

I originally planned to interview approximately 30 women teachers born in the post-war 'baby boom' (currently aged between 50 and 60), half of whom would still be working as teachers, and half early retired from the teaching profession. The category of those still working was defined by a current full-time teaching contract with the number of years spent in teaching not being regarded as a factor of specific relevance to my study. In the early retired category, I was hoping to interview women who had retired relatively recently from teaching, specifically since the policy changes that took place in the late 1980s and 1990s. Furthermore, I wanted to compare the experiences of primary and secondary teachers in both inner-city and rural schools: I anticipated that their responses would be diverse. Since women teachers are retiring early, not only from inner-city 'stressful' working environments, but also from rural, supposedly 'idyllic' ones, I wanted to explore exactly what factors in their working lives most affected their job satisfaction, and thoughts of early retirement.

In order to identify my 'working' sample, I planned to contact both urban and rural primary and secondary schools with the aim of finding volunteers for interview in each of four proposed categories:

- inner-city primary
- rural primary
- inner-city secondary
- rural secondary

In addition, I needed to identify potential interviewees who had retired early from the teaching profession, hoping to achieve a mix between my categories in terms of where, and what age group, they had taught during their working lives. I was, at this stage, concerned that if, within these four categories, I was also attempting to interview some retired teachers, the number in each group – now, in theory, eight – would be very small.

Following the ease with which I found my pilot interviewees, I thought that my final sample could probably be identified through 'snowballing' from initial contacts with schools or via interviewees passing on names of friends and former colleagues as potential participants. I proposed using purposive sampling to produce a variety of interviewees capturing the main dimensions of the research. In order to identify an appropriate sample I used a combination of methods. A brief questionnaire was designed in order to help me to achieve a sample that included teachers in the required age group, school sector and work/retirement status. It also gave me a record of contact information and details. In view of the anticipated contrast between the experiences of primary/secondary and inner-city/rural education, I regarded it as important and relevant to establish whether there were differences in the experiences of teachers in different sectors of education as well as between different geographical locations.

Although the sample was to be exclusively female and within a defined age range, I also hoped to include women of different marital status. For example, women who were or had been single or divorced as well as married or partnered, might be influenced by different factors in making their career and retirement choices. I also hoped to include women of different family status, some who had children and some who did not, since I regarded this as a potentially important factor in terms of their careers. These areas of enquiry were particularly important given my interest in exploring the degree to which these professional women make decisions/choices influenced by patriarchal social structures.

For reasons of personal interest and the limited time available, I had already decided to restrict my research to women teachers and not include their male counterparts. The problem of exit from the teaching profession differs between the sexes. Men tend to either leave for a different career or financial advantage at a much younger age, or apply for promotion, particularly in the secondary sector, thereby enabling them to occupy positions of power and authority that offer a greater incentive to stay in the profession.[5] Since approximately 70% of all teachers are women, their early retirement from the profession constitutes a proportionately greater problem than early retirement by men.

[5] See Appendix 6: 'Head teachers in the maintained schools sector in England and the Study City by gender.'

An additional point regarding my sample is that I have concentrated my research on the state sector. My main reason for omitting private schools was that they are, broadly speaking, less directly affected by the recent changes identified as having a significant impact on state schools and, since education policy changes form a central part of my research, this area of questioning would be less relevant in the private context. In terms of the question of stress levels and job satisfaction as factors in early retirement, class sizes are generally smaller and class discipline problems fewer in private schools, and early retirement by women teachers in the private sector is not an issue for government education policy.

- **The gap between plan and practice**

During the months between conducting my pilot interviews and starting the process of sample identification, my personal connection with Dorset was severed and, given the fact that I was a solo researcher on a limited budget, I made the decision to abandon the idea of an urban/rural comparison for practical reasons. Although disappointing at the time, this change had the advantage of making the research more focused on inner-city schools, and I needed to redefine my study population accordingly. I returned to the plan of four groups of interviewees:

- working primary
- retired primary
- working secondary
- retired secondary

Initially, I experienced considerable difficulty in finding secondary teachers to come forward for interview, but because I was seeking a purposive sample, I continued to make contacts until my 'quotas' for the four categories had been filled. Ultimately, my sample was determined by the availability of volunteers meeting my research criteria.

Regarding my 'working' sample, initial contact was made via letters to the headteachers of all the schools under the control of the unitary authority of my research. I explained my research project and asked them to pass on the information about the research to any

members of their staff who met my criteria of gender and age. The information enclosed with these letters included a poster for displaying on staff-room notice boards and flyers that could be distributed to individual teachers or put in their pigeonholes.

The first responses came from primary head teachers who, in some cases not only participated themselves, but also disseminated information to their relevant staff, friends and colleagues, so 'snowballing' worked quite quickly in this group. This network effect might have resulted in bias from a group holding similar views but, in addition, these teachers put me in touch with retired friends who had something very different to say. I had always planned to use snowballing amongst retired teachers, but had hoped, and expected, that working teachers would volunteer more readily via the information sent to schools.

The response from secondary schools was significantly slower and I resorted to telephoning headteachers with a more direct, personal approach, and a request to re-send the information for their staff. There were four categories of response from the headteachers to this approach:

- There were no teachers in the specified age group at the school
- The information had already been passed on individually to relevant teachers
- The poster had been displayed but no-one had responded
- A 'gatekeeper' approach in which one male head teacher decided not to display or pass on the information because he did not want his teachers to undertake more 'work'. He, in effect, prevented his staff from make their own decision about participating even though the interview would not be taking place during school hours. This was particularly disappointing given that his secretary had informed me that there were 'several' teachers working at the school who met my criteria.[6]

The disparity of response to, and interest in the research, between primary and secondary schools was interesting. Not only did several primary heads become involved themselves, but they also enthusiastically passed the information to their staff and to former colleagues, enabling me to find my sample quite quickly. In contrast, secondary school heads were

[6] The letter, enclosing my poster and information on the project, returned by the headmaster's secretary read 'I am sorry but Mr P has refused permission for the attached to be handed out, so I am returning it to you.'

less interested both in volunteering for interview themselves, and in passing on the information to colleagues.[7] The primary sector displayed the characteristics of a smaller, family-oriented community with good communication between staff and heads and a higher proportion of female staff, whereas the secondary community was characterised by its large-scale, with less communication between individuals on non-work matters. One secondary teacher told me during her interview, that her school had 'an enormous staff room with a small notice board' that was 'infrequently looked at by most staff', and where notices were 'quickly covered up by new displays' (RS8).

However, once I started to make contact, and established communication, with working secondary teachers, and particularly once I started to interview this group, I was finally able to identify my 'retired secondary' group, mainly through snowballing. If they had appropriate contacts, I asked interviewees to pass my information to their friends/former colleagues rather than approaching them direct and this, inevitably, led to my 'losing' some potential participants.

A further point of interest regarding the contrast between primary and secondary sectors was that, despite secondary teachers having 'free' periods during their working day, most chose times outside school hours and indeed away from the school itself for their interviews. Most were prepared for the interview to take place with minimal interruption, for example by putting on their telephone answering machines, though several of their husbands provided liquid refreshment in the form of cups of tea and coffee. The primary teachers generally chose to be interviewed in school at the end of their working day having been almost all day with their classes since their arrival in school in the morning. These interviews tended to have more interruptions, mainly from colleagues starting what one teacher described as 'the evening shift' of tidying up at the end of the day, and making advance preparations for the next.

At the time of abandoning my plan to interview teachers in both urban and rural locations, I hoped to identify a representative sample across the socio-economic range of the urban schools, but because of such an uneven and sparse response I was forced to interview

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[7] However, it should be noted that out of the 17 secondary schools approached, only 6 had female head teachers, an issue already discussed in the previous chapter. See Appendix 4 for a national and Study City comparison of head teachers by gender.

most volunteers who came forward. The final sample was drawn from a range of socio-economic areas across the city and, although three primary teachers had connections with the same school, they had very different experiences and influences in their professional and private lives. One of them was the head teacher, one had only relatively recently joined the profession and one had retired from the school four years previously.

In concluding this section on sampling, the response to my initial approach was disappointingly low, yet it is impossible to know how many potential interviewees the information reached. I did not regard the lack of volunteers as a 'non-response' because I had no way of knowing whether or not the information reached the potential sample population, as already discussed in terms of at least one male secondary headteacher's negative attitude. This initial approach seemed appropriate given that it was not possible, because of data protection considerations, to contact teachers direct. Most teachers described the hectic nature of their working lives during their interviews, and it is likely that sheer shortage of spare time may have deterred some teachers from participating, despite the information clearly indicating that involvement would only amount to an hour or so of their time. However, the diversity of the working and retired teachers that I finally interviewed was wide, so that the data gathered were complex, with deep and significant differences, as well as interesting similarities, both between and within the four interview groups.

- **Conducting the research interviews**

Wengraf (2001) described semi-structured interviews as a 'high preparation, high risk, high gain, high analysis operation' (p5). Selecting and planning questions that would obtain the most valuable and relevant information, as well as deciding what type of interviewing method to use, represented a significant challenge to me as a novice, solo researcher. 'Interviews yield rich insights into people's experiences, opinions, aspirations, attitudes and feelings' (May:1997:109).

- **Interview practice and reflexivity[8]**

I found it relatively easy to establish a good rapport with the teachers during interviews and to engage fully with them. In practice, the order in which I asked my questions worked well. All my interviewees were keen to talk at the beginning of the interview about structural change in the education system, and social change in terms of the pupils and their parents. I had no problems in eliciting an enthusiastic response that seemed, in most cases, to continue through the rest of the interview. There tended to be a high level of engagement with the interview process and interest in the questions asked.

My first interviewees were teachers who were still working full-time, since this was the group I had decided to approach first via head teachers. I was pleased that the pilot interviews had been the catalyst to changing the format, as already discussed and, in almost every case, the interviews took about an hour. For pragmatic reasons, I interspersed some questions that required very brief answers with other open-ended questions that allowed the interviewee to respond to more complex issues at greater length. The advantage of open-ended questions in this context was that they allowed the respondent to answer on her own terms, enabling me to discover unexpected things about the way she viewed a topic (Seale & Filmer:1998:130). This mix of questions about fact, opinion and experience proved to be successful in eliciting fuller, more detailed informative answers.

Although I had planned to tape-record all my interviews, I decided after the first group of interviews not to do so. This was, in part, because I felt that recording was an impediment to the smooth flow of responses. On one occasion, during the very early stages of the interview, the tape recorder was making strange noises and I discovered that the tape was slipping, so we started again, using written answers. On another occasion, when an interviewee objected to the interview being recorded, I had to write her answers down and found that I was taking in the information better during the interview. I was, therefore, more able to probe and to change the order of the questions in response to her answers as necessary. So I decided that I would print out the interview guide leaving adequate space for written responses and, as I am able to write both long- and shorthand quickly I did not

[8] See Appendices 8 & 9 for 'final' interview questions.

feel that this was a drawback or disadvantage. In order to overcome the problem of quotations implicit when an interview is not recorded, I asked for confirmation and double-checked any particularly quotable response in order that it could be directly attributed to the interviewee.

It could be seen as problematic that there is no *verbatim* record of every interview, since, when using this method, it is not possible to write responses down word for word. It could be argued that the interviewer could record written answers and employ a form of selective transcription influenced by his/her own perception, thus producing distortions. I do not believe that this was the case here because the subjects were co-operative with the interviewing process and happy to allow the pace to, on occasion, be slowed whilst complete and particularly detailed answers were recorded: in fact, this often elicited additional valuable 'snippets' of information. Whilst verbatim transcription would have offered the potential advantage of making every word of every interview available for use in analysis, I transcribed the first twelve in this way (including two pilot interviews) which helped to guide my lines of enquiry for subsequent interviews. This enabled me to revise my interview schedule and subtly alter its focus and emphasis: the reflexive process was still possible as I proceeded with my non-verbatim transcription process. As Dillon suggests, this method is effective as long as it remains possible to report with accuracy the events that transpired in the exchange, and as long as the researcher has a systematic way of capturing the question-answer that did in fact occur (Dillon:1990:173).

An unanticipated advantage discovered in writing long- and short-hand answers was the facility of looking through at the end of the interview and instantly identifying 'spaces' where answers had been brief or 'incomplete'. This allowed me, on several occasions, to 're-visit' questions for a fuller response. Since all my respondents agreed to be contacted again for follow-up questions or clarification of responses in the event of my needing to do so, I knew that I could double-check and confirm the data if I deemed it necessary in order to achieve a complete record of the interview.

- **Ethical issues**

Whilst it is anticipated that the ethical concerns arising from the proposed research are themselves general, the primary issues for consideration are:

- Confidentiality and maintenance of anonymity, particularly in data security using computers.

- Sensitivity when asking questions of a potentially intrusive nature, and an awareness of the possibility of emotional recollections.

- Honesty with the interviewees as to the nature and expected outcome of the research in which they are participating, and obtaining informed consent to that involvement.

- Recognition that informed consent is an ongoing concept and part of the research relationship, and that participants are volunteering and can withdraw from the research project at any time should they wish to do so.

- **Data analysis**

My main source of data was 32 interviews with women teachers, as discussed above, and at the start of the process of analysis, these were in the form of transcriptions of taped and handwritten interview responses. There are essentially two stages to data analysis – ordering and summarising data, and interpretation of data. In order to do this, I needed to be familiar with the data before starting the analytical process, devise a suitable 'filing system' for the data, develop a matrix in order to move data from transcripts to the thematic areas, and interpret the data collected.

Analysis of the transcripts enables a familiarisation with, or 'immersion' in the data (Bryman & Burgess:1994). It continues immediately post-interview and particularly during the transcription process when it is helpful to make additional notes and memos about the experience and ideas stimulated during the re-hearing of the interview. Wengraf calls this

'transcribing creatively' and suggests that it is a process in which you are forced to work slowly through a technical task while your mind has time to think 'fast and widely' about the material and the event in which the material was gathered (Wengraf:2001:209-10).

Over the period of time during which the interviews were conducted, I developed a continuous and ongoing process of analysing after interviews, identifying concepts and themes and making provisional decisions as to whether certain areas should be examined in greater detail. By looking at these themes I was able to begin to work out theoretical and policy implications of the data and what broader questions they might answer. As already discussed, greater structure was introduced following the pilot interviews in order to give more focus to questions relating to feminist theoretical issues. I formulated ideas as to relevant coding schemes using the principle themes of my research and these were revised on an ongoing basis, since some were not ultimately applicable or relevant, whilst others gained in significance during the data collection process. This makes the method of analysis both dynamic and flexible – 'it can be a healthy corrective for built-in blind spots' (Miles & Huberman:1994:50). .

In order to become thoroughly familiar with the interview data, I transcribed all the interviews myself. A (seemingly) enormous amount of data were generated in the interview process, and I identified several qualitative data analysis packages specifically designed for the management and analysis of text data that I thought would potentially be helpful. Some packages provide for the integration of qualitative and quantitative data so that I would be able, for example, to analyse lifecourse statistics relating to the number of interviewees who are married/partnered or who have children, and to cross reference this with their responses to thematic interview questions.

I had hoped that I would be able to proceed immediately with editing and analysis of my textual data in this way but, in the event, I was unable to access a data analysis software package, so my plans to carry out analysis in this way were stymied. I decided to resort to the tried-and-tested method of 'cut and paste' using both computer and numerous large sheets of paper, highlighter pens, scissors and glue! However, before I had progressed far employing these 'techniques', I learnt that I could access a course on, and purchase a

student licence for, a data analysis software package.[9] So my analysis was, in the end, carried out using a combination of old-fashioned and computerised 'cut and paste', and the latest version of a high-tech computer software package.

My first step was to randomly allocate codes to the interviewees that identified them only on the basis of their work/retirement and primary/secondary status. Next I recorded, for each interviewee, any demographic and work/life history information from the data so that I could see and refer to, for example, their marital status, whether or not they had children, length of career breaks, their qualifications and career entry.[10] I then wrote a brief biography of each interviewee so that I could begin to identify both their management of the work/life balance in terms of their husband/partner, children and career, and also to look for any significant turning points or 'epiphanies' (Denzin:1989) that may, potentially, have been a factor in the decision to retire, or not.[11] At this stage, I began to identify relevant passages in the transcripts, and to highlight and code quotes that might ultimately be used in my findings and analysis. I added information on the teachers' 'attitudes to change' to my demographic table since deeper exploration of the data via the creation of 'brief biographies' began to reveal that there were important and significant differences *between* the sample groups, and similarities *within* them. This was then cross-checked, by looking at the responses of each teacher to questions specifically about change, with other responses where they had themselves referred to change, either positively or negatively.

Since the interviews were divided into three sections, the interview data were immediately available under the three key themes of the research. In order to look in more depth at the group responses on each theme, and each question, I assembled all the answers given by sample group. This enabled me to see, for example, all of the retired secondary teachers' answers to questions about career breaks, or the marital status of all the working primary teachers, and this gave me a broad overview of the data that enabled me to identify similarity or diversity in their responses. I then took this a stage further and looked at all retired teachers (and all working teachers), and all secondary (and all primary) teachers' responses which revealed recurring themes within these groups. At this stage I felt that I was deeply familiar with the data and used a computer analysis package to code in a more

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[9] ATLAS.ti was used for the computer analysis.
[10] See Appendix 4: 'Lifecourse data of research sample.'
[11] See Appendices 10-13 for 'Brief Biographies' of the four sample groups

detailed way along the themes identified during the 'manual' analysis process which enabled me to reach my final analysis and conclusions.

The following three chapters contain the findings and initial analysis along the three key themes of my research:

- Chapter 5: The work/life balance
- Chapter 6: The early retirement decision
- Chapter 7: Educational and social change

The contents at the start of each chapter correlate with the interview questions on each of the three themes.

Chapter 4

CHAPTER 5

RESEARCH FINDINGS: THE WORK/LIFE BALANCE

Interviewer: ***'I'd like to ask you about your life outside teaching...'***

Teacher: ***'Is there such a thing?'***

INTRODUCTION

- **Why did these women choose teaching as a career? Do they think teaching is in any way a 'convenient' career for a woman?**
- **What was the marital status of the teachers interviewed? Did they have children?**
- **Did the teachers have career breaks and, if so, what affect did they have on their career?**
- **What geographical moves had they made, and why? What effect did these have on their careers and personal lives?**
- **What are the teachers' personal attitudes towards change? Do they find it easy or difficult to adapt to new situations in the 'two spheres' of home and work?**
- **Would these teachers choose teaching if they were starting their careers again?**

CONCLUSION

INTRODUCTION

Questions in this section of the interviews were designed to discover how women teachers achieve a satisfactory work/life balance during their careers, and these link with the theoretical explanations of the gendered division of labour as discussed in Chapter 1, 'Explaining Women's Work: Structural Constraints and Individual Choices.' Here it was suggested that, whilst some women seek to deliberately prioritise either their career or their family, the majority strive to find a satisfactory combination of work and family lives (Crompton & Harris 1999). On the 'work' side of this equation, half of the teachers interviewed had recently retired prematurely from full-time teaching posts, whilst the other half were still in full-time teaching. Changes in education policy have radically altered the day-to-day work of teachers and questions about each teacher's personal 'life' outside their work were designed to explore what has inevitably been an ever-changing and evolving work/life balance during their careers. What factors in their family lives had influenced their work/life balance? And what potential 'push' or 'pull' factors in their lives outside the classroom had influenced their retirement decisions?

As discussed in Chapter 4, thirty-two interviewees were divided into four groups: Working Primary (WP1-8), Working Secondary (WS1-8), Retired Primary (RP1-8) and Retired Secondary (RS1-8). Firstly they were asked why they had initially chosen teaching as a career, and about their perception of it as a potentially 'convenient' career for women. There was a widespread view at the time of their entry into the teaching profession that it was an 'ideal' job for women given its supposedly good fit with family life, particularly young children. Had they found teaching to be a good career choice in terms of the work/life balance? The teachers were then asked questions about their marital status, children and parents; career breaks, geographical moves and the effect of these on their working and personal lives; their individual attitudes towards change, and whether or not they would choose teaching again.

- **Why did these women choose teaching as a career? Do they think teaching is in any way a 'convenient' career for a woman?**

Teacher: ***'Did I really choose it? It seems hard to believe!' (RP8)***

Motivation towards teaching as a career varied both *within* the four groups of interviewees, as well as *between* them, though some quite distinctive trends were evident. There were similarities across *all* primary teachers, whether working or retired, and across *all* secondary teachers as well as some similarities between retired teachers and working teachers. Besides individual motivation towards teaching, the qualifications and training route were a significant factor in their career path. Of the sixteen primary teachers interviewed, twelve had gone from school to teacher training, one had embarked on a primary teaching career in her thirties, via a degree course, and another had attended a specialist music college before entering the teaching profession.[1] By contrast, of the sixteen secondary teachers interviewed, eleven had been to university and then taken a PGCE qualification, and five had gone to teacher training colleges, with one of those being in the first pilot group taking the BEd qualification.[2]

Looking firstly at the most uniform group in terms of responses, the **working primary** teachers, seven of the eight teachers interviewed described their career in teaching as a positive choice:

> 'I always wanted to (teach). I used to play 'schools' as a child from six or seven onwards.' (WP7)
>
> 'As a child I had red and green pens and made up sums for my brothers and sisters.' (WP2)
>
> 'I chose to go to college at the age of 34 because I enjoyed teaching. I was a part-time teacher of typewriting and computers. I chose primary teaching because that is what I always wanted to do.' (WP4)

Several teachers acknowledged that their choice had been made in the context of there being a limited career choice in that era, and one, a head, said she had chosen teaching:

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[1] The entry route into the profession of the other two primary teachers is not known.
[2] Appendix 7 – 'Research Sample: Life Course Data – Entry route of primary and secondary teachers into the profession.'

'...because it wasn't nursing, and I thought I could do better than being a hairdresser. When I was choosing a career, those were the options. We had very little career help being at school back in the sixties. You either went to university or did teaching or nursing or hairdressing. I wasn't expected to get good enough grades at A level for university and I couldn't bear sick people and teaching just seemed to be what everybody else did.' (WP3)

However, an overwhelming majority had chosen the career as a vocation and said that they had 'always wanted to teach.'

Teachers in the **retired primary** group appeared to have been less motivated by teaching as a career, although four of them mentioned wanting to work with children:

'Because I'm the eldest of seven children, I'd always been with children and I love working with children. It was a toss up between being a children's nurse and a teacher.' (RP2)

Despite the question being asked in the same way, a majority of this group had been influenced by parents or relatives to become teachers:

'My parents were keen that I became a teacher. My father was a teacher so I had been brought up in that environment and with that influence.' (RP6)

'My parents weren't keen for me to go to university. I think they were a bit in awe of it and I would have been the first in my family to go. They thought that students were layabouts and that you should train for a job. I suppose I chose it, but in some ways other people chose it for me.' (RP1)

A significant number of teachers in this group, like the head teacher quoted above, suggested that they had chosen teaching, partly because it *wasn't* something else:

'I went to a girls' grammar school and almost everyone went into teaching or nursing or secretarial work. I didn't like the sound of either of the others so chose teaching.' (RP5)

'The choices were basically between teaching, nursing and office work but I was pushed towards going to college for teaching.' (RP8)

'I went to grammar school and there were very few options career-wise. It was really only between going to university to study your best or favourite subject, or nursing or teaching. I didn't really want to go to university, and I would have been a dreadful nurse!' (RP4)

Half the teachers in the **working secondary** group had made a positive choice to become teachers and several had done so because of positive teaching role models. This teacher had been influenced by both:

> 'My older sister was already doing teacher training and was enjoying it, and I was pretty sure I'd like it too. Also one of my aunts was a teacher and had encouraged us both from quite an early age. We used to play 'schools' when we were quite little. Both of us enjoyed our school days so I suppose it was quite a natural and obvious thing to want to do.' (WS7)

Only one teacher in this group suggested it had been a negative choice in that is wasn't something else.

In the **retired secondary** group, six of the eight teachers interviewed had gone to university first, and it was only after gaining their degree that they had decided to go into teaching.

> 'I decided on teaching while I was at university. I had thought of it before when I was at school but went to university first. I decided that teaching would be a good career for me as an individual and as a woman. My parents thought it was a good idea and supported my decision.' (RS3)

> 'I was persuaded (by teachers) to go to university and study biology... I came from a family background where university wasn't on the cards. So I started off going to university and then decided on the teaching. Mind you, teaching was in the family because I had two uncles who were teachers.' (RS5)

The teacher who was part of the BEd pilot whilst at teacher training college had chosen teaching because:

> 'I was advised by my head and my mother that it was a good, safe job that would enable me to be independent at the end of it all.' (RS4)

And one teacher had been unable to take up her first career choice but, nevertheless, felt that teaching was a positive choice:

> 'Well, first of all I did want to be a policewomen...but it was all about height in those days... Anyway, I was musical so it was suggested that I do something with that. I thought it was a good career for women because you could aspire to higher levels in that particular area.' (RS6)

Turning now to whether or not the teachers interviewed thought of teaching as a convenient career for women, almost all the **primary teachers, both working and**

retired, regarded teaching as convenient in terms of combining it with bringing up a family. However, several said that they had not thought of it in that way when they made their career decision. Some of the retired group seemed to have been influenced by this work/life balance in their choice of career:

> 'Yes it was always drummed into me that teaching was an ideal career for a woman who wanted to combine work with a family. I was keen on the idea of teaching and assumed I'd get married and have children, as we all did, so it seemed a good plan.' (RP3)

> 'Well I always thought I'd like to get married and have children, I think we all did in those days, and I did think it was convenient in terms of combining it with having a family. The school said that, and so did my aunt.' (RP5)

Most of the primary teachers who were still working saw teaching as having been a good career choice for mothers when they began their careers, but that changes in the job of teaching meant that whilst it once *was*, it no longer necessarily still *is*:

> 'It used to be when you finished work at the same time as the children went home, and the holidays really were holidays, but now you have to stay on till say 6, take work home at weekends and plan for the coming term during the holidays, it's much less convenient.' (WP1)

> 'We don't finish work any earlier than anyone else now, and need to spend time on preparation at weekends and in the holidays. Also, we can't go to our own children's assemblies and sports days because we have to be with our own class at school.' (WP5)

This last point is, of course, a factor in primary but not in secondary teaching where teachers are not with their 'own' class throughout the day. For **secondary teachers**, again a majority felt that teaching *was* a good career for women, but is less so in the light of educational change:

> 'In my day, it was assumed that we would get married and have a family and that the woman would be responsible primarily for childcare. The fact that you could then go back to work in the term time only when they started school was seen as fitting in well, and it did then. It's only more recently with the longer hours that teachers tend to work that mean that they need to use childcare after school hours.' (RS3)

> 'Yes you have to acknowledge that it's convenient with a family. Not so much nowadays because now I tend to work most of the time in the holidays, but when my children were young you had the school holidays and didn't do any work.' (WS4)

Like their primary counterparts, many had not thought of teaching in that way at the time of their decision, though they felt that there were cultural assumptions about getting married and having a family:

> 'I didn't really think about that at the time... All I know is that most girls were assuming that they'd get married and have kids and often what job or career you did was only expected to be for a few years until the first baby came along.' (WS7)
>
> 'I do think it is convenient in terms of holidays especially. And I suppose I did assume that I'd probably get married and have a family, but I didn't really decide on it for those reasons.' (RS2)

- **What was the marital status of the teachers interviewed? Did they have children?**

Of the 32 teachers interviewed, 26 were in long-term marriages, 2 had never married, 1 was widowed and the remaining 3 had been through various periods of marriage, divorce, partnership and being single. Fifteen of the sixteen primary teachers were in long-term marriages begun during their twenties. Because of this marital status profile, an overwhelming majority of the sample had not been the main 'breadwinner', and their husbands' careers had been given priority over their own. This will be explored in terms of career breaks and geographical moves later in this chapter.

Most of the teachers had children. Five of them had three children (including one set of twins), eighteen had two, six had one child and only three had no children. Four interviewees, all retired primary teachers, mentioned grandchildren or step-grandchildren, and other family members, mainly the teachers' parents, were referred to in various contexts, including helping with their children when they returned to teaching. For example:

> 'I went for this job and when I got it my mother agreed to help with the girls. She was very supportive because she would have loved to have been a teacher herself and she wanted me to go back and get on with my career' (RS2).
>
> 'My mother looked after my daughter in the early days and they still have a wonderful relationship to this day' (RS3).

Parents were also mentioned in the context of needing care in their old age. Other ways in which their personal lives had affected the work/life balance included serious illness of family members (one husband with cancer, a daughter suffering from anorexia and a mother suffering a stroke) and their own ill health (two of them had been away from work for a term).

- **Did they have career breaks and, if so, what effect did they have on their careers?**

Given that all except three of the sample were mothers, an overwhelming majority had taken career breaks.[3] It is at this stage in women's careers, with the advent of children, that work/life balance becomes important and decisions must be made about career and family orientation and priorities. Virtually all the interviewees followed an 'in-out-in' pattern of working to fit with their children's early years.

Many of the interviewees seemed to accept as inevitable the consequences of deciding to have a family, and traditional definitions of the hierarchical ordering of home versus work priorities in the lives of married women with children.

There were differences between the women in terms of career breaks and career orientation and, although there was wide diversity in the length of time taken for career breaks, there were broadly four categories. Firstly, the non-mothers who had not had career breaks and four others who took a minimal break. Secondly, several had a career break to have children, then returned when the youngest was about 2. Most in these two groups were secondary or working teachers.

> 'There's only one year between them because I wanted to go back to work at least when they were both at school if not before. I went back when the second was 2.' (WS5)

Thirdly, teachers took a career break until their youngest child started school. And fourthly, a few had a longer break, or returned gradually, taking several years after their children were at school before returning full-time.

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[3] Appendix 4 – 'Research Sample: Life Course Data' – for details including marital status, number of children, length of full-time and part-time career breaks.

Some of the teachers, mainly in the primary sector, were positive about the decision to take a career break to be with their young children:

> 'I thought then, and still do, that it's the right thing to be at home with young children and babies. I think it's a shame that things have changed now and so few mothers choose to or are able to.' (RP4)

But others found the experience problematic:

> 'I found that a very difficult time. I hated being at home. You know you miss all that buzz of being at work and so on. I had to really lift myself then... The break was very much because I felt I should be at home with the children but, as I say, I found that adjustment very difficult.' (RS5)

> 'I had enough quite quickly of just being at home with the children and really wanted to get back to work.' (WP3)

And one acknowledged the problems of the work/life balance dilemma:

> 'I was torn between home and work, but decided that I'd be a better mother after work than if I was doing it all day.' (WS6)

Regarding the experience of returning after a career break and the effect on their careers, the teachers were divided fairly evenly between it being a negative experience, a positive experience or one having a minimal or neutral effect. On the negative side, some found the work/life balance problematic whilst others, who had taken a longer break, returned to find their difficulties compounded by the implementation of significant policy changes in their absence:

> 'I was exhausted I must admit because it came as a bit of a shock after several years at home when I could get chores done during the day.' (RP5)

> 'I found it a challenge dealing with the children and a full-time job...and it was just as SATs and inspections were being introduced which was something else to contend with' (RS8)

> 'I had to go back on the 'bottom rung.' Also the National Curriculum had been introduced while I was away, so it was quite a shock. And I was going through a divorce at the time.' (WS8)

Another negative response came from a teacher who had taken a relatively late career break of 7 years:

> 'It did affect my promotion because I might be a head now had I not taken that time out. But I had got to the point where I was a Head of Department before I had my family, and I went back into a job that had much less responsibility.' (WS4)

Others were either not affected at all or only minimally, particularly one teacher taking an early break:

> 'I had my career break so early in my career that it didn't really affect me.' (WS2)
>
> 'I'd been a classroom teacher and I went back as a classroom teacher' (WP6)

The 'positive' group comprised, amongst others, all three working primary head teachers:

> 'When I gave up to have Sam, there was no such thing as maternity leave. You left, that was it... And I had a twelve year career break and during those twelve years I did fixed term contracts, supply teaching, office work, youth clubs, so that was very varied. I wouldn't have missed it because I had a great, varied time and it was just fun... And on returning full-time: '...That was when I thought of it as a career for the first time. I mean, I had never thought I wanted to be a head or anything like that.' (WP6)
>
> 'I went back in at the level where I'd left off. I'd taught for 8 years before I had my first child and I'd already gone up the ladder a bit. And then, when I went back the head could quickly see where you're at and if you're interested in promotion you can go on. Some teachers don't want that and are happy with just teaching and that's fine.' (WP3)

The primary teachers who had retired early showed significantly lower career orientation when asked if the break had affected their career:

> 'I'm not really a career person, so no, it didn't' (RP3)
>
> 'I didn't really have big career ambitions. I liked the chalkface more than the idea of being an administrator or manager.' (RP4)
>
> 'I'm not a career person. It was suggested that I went for deputy headship, but I didn't want to do it. I liked the classroom too much and I'm not ambitious.' (RP7)

Several teachers referred to the gendered nature of career breaks:

'It wasn't so much the break as the fact that I was a mother that affected my teaching career. I haven't really considered going for promotion since then although I had started in teaching thinking I'd try to become a head.' (RP1)

'I've not worked with any male colleagues who have taken career breaks. Although there are fewer male teachers in the primary sector, the ones that are tend to become head teachers pretty quickly. I think it's because... I think as a female teacher you tend to have family responsibilities, whereas male teachers will perhaps get more involved with the administration and management roles. Not always but...' (RP2)

'I would like to have returned full-time, but it was only for a year that I was part-time. But I did miss out on promotion and was behind my male colleagues who hadn't taken time out.' (RS7)

The teachers were also asked if they had been concerned about the effect of a career break on their pension entitlement. These two answers are typical:

'No, I didn't really consider that, and anyway it wouldn't have affected my decision to stay at home until the children went to school.' (WS2)

'I didn't think about pensions then. Like most people even today in their late twenties, pension planning seemed so far away that it wasn't uppermost in my mind.' (WS7)

Some were critical of the pension system itself:

'Well, it's 40 years you have to work to get the full pension and who's going to do 40 years? I've done 24 pensionable years. It has to be 40 without a break which means working 'till you're 62 without a break. It's ridiculous!' (WP6)

- **What geographical moves had they made, and why? What effect did these have on their careers and personal lives?**

There was a wide variation in the number of moves the teachers had made, both within the same city and in different parts of the country, yet there were two main reasons for moving. Firstly, over half had moved to a different city, mostly early in their careers, because of their husband's job. Some were accepting, others reluctant:

'We moved because of my husband's job. He earned more than me and his job was the main one. And because of my age, I suppose, I've always thought that his job was more important than mine and that I'd have the children and look after them.' (WP3 – now a head teacher)

'I didn't really want to leave Manchester but women, especially in those days, were expected to go where their husbands needed to be for their best career opportunities. My career has always been secondary to my husband's.' (RP6)

In several cases moves were made during a career break for small children, thereby lessening the specific effect on their own careers.

> 'We made the move because of my husband's promotion but I wasn't working so it didn't affect my career as such.' (RS5)

For others, it had been a decision taken jointly and with both careers in mind:

> 'We've moved three times because of my husband's job. (That) has always come first, though he's always respected my love of my work and my need to work.' (WS5)
>
> 'We went abroad for two years... then moved back to (the study city) and planned our career paths. Any moves were career moves connected to promotion' (WP2 – a head teacher)

One teacher, now a primary head, experienced the gendered nature of work and the inferior position of women's careers, early in her career when she and her teacher husband were planning a move together:

> 'We chose (the study city) because it seemed a nice place to be, and we both got jobs in schools. I got my job first! At my interview they asked what I would do if I was offered the job and my husband didn't have a job. Can you imagine the trouble you'd be in if you asked that question now? Wow!' (WP6)

However, there were some for whom moving for their husband's career had a deep impact on their own career:

> 'I gave up full-time teaching which was very much a backward step, because in the previous school, I had been part of the way up the main scale because of the experience I had, and by the time I left I was deputy head. So I gave up deputy headship to work part-time in mainstream teaching.' (RP2)
>
> 'Coming back was a move for my husband's career and it was detrimental to mine, but going to London I was promoted dramatically – I think they were just so desperate to get people teaching in the inner city, but coming back I really went right back to where I'd started.' (WS1)

Secondly, many of these teachers had moved for family reasons, either to 'upgrade' their home, move to a better area within the city for their children, or to be nearer to other family members, and had consequently moved jobs if travelling to work would have proved difficult. One teacher had moved three times since being in the study city just for better jobs, and once moved house to a better house and a job nearer to her new home

(RP3). Another made a pragmatic decision in relation to travelling and to school reorganisation in the city:

> 'I do think life's too short to spend too much time travelling to work. So I decided that even when (the city council) came to be in charge of the city schools, I wasn't going to be driving all the way to the leafy suburbs. I haven't moved because of my husband's career. He was at the boys' grammar and I was at the girls' and, believe it or not, he spent his entire career there. But then it became comprehensive.' (RS4)

- **What are the teachers' personal attitudes towards change? Do they find it easy or difficult to adapt to new situations in the 'two spheres' of home and work?[4]**

This question was asked in order to explore the extent to which changes in the education system, social change and change in the individual teachers' personal lives might in some way influence their decision to retire prematurely from the profession, or at least from a full-time contractual commitment. Could their response to and experience of change in different areas of their lives act as a 'push' factor from teaching or, indeed, a 'pull' factor towards the domestic sphere. Reponses were surprisingly uniform *within* each of the four groups of teachers, though this was more pronounced in their attitudes to change in their personal lives. The two groups who were still working were the most positive, and retired primary teachers the most negative.

Firstly, amongst the **working secondary** group, all eight teachers gave a positive response, with some of them embracing change with relish, and seeing it as a welcome challenge. Their positive responses to change in general included:

> 'I like the challenge of change. It can be fun if you're always aware of the positives rather than the negatives.' (WS7)

> 'I'm an energetic person so it wasn't a problem, moving house three times or anything like that. I like meeting new people, so does my husband, so that was fun. And I like a challenge, and change is often challenging in one way or another.' (WS5)

> 'Some people just hear the word 'change' and assume it'll be all bad news. I'm definitely not like that.' (WS6)

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[4] Appendix14 shows the teachers' attitudes to change in their personal and working lives by group.

Their responses to educational change associated with policy initiatives and in relation to parents and children were also positive:

> 'Once many of the changes were up and running, you could see the plusses and ignore the minuses.' (WS2)
>
> 'I've adapted to the changes in education and teaching and have tried to look for the positives, which there are in all of them. Once you do that you can find ways to work with the changes and take them on board.' (WS2)
>
> 'I've dealt quite well with the changes in schools, and although the behaviour of pupils and parents can get you down from time to time, and there's a big change there, I've still managed to deal with it one way or another.' (WS6)

One teacher had used her own positive attitude towards change to help others to cope in change in their work environment:

> 'When we had a change of head teacher I seemed to become a stabilising factor when some of the staff left because of the change. I helped others to cope with the change. Some of them considered leaving... There were a couple of teachers who left the school when the new head came simply because they could not cope at a personal level with the change in personalities. There was this turmoil in those people...a resistance to change and looking for a way out' (WS4)

Finally, one teacher (WS8) had experienced many ups and downs in her personal life and had brought her daughter up on her own. She said that she 'liked variety' and felt that she had 'become more flexible and open to change' as she's got older. She had changed from teaching food technology and textiles initially, to being Head of Department for ICT in a large inner-city comprehensive, a change which had required a great deal of re-training and professional development. Despite acknowledging that changes in her personal life had sometimes been upsetting, she told me:

> 'I'm a Taurean, and Taureans basically don't like change. We like things stable and secure. But I've had to embrace change. I'm very pragmatic – it keeps you young!'

The **working primary** group was also largely positive about change in a general sense:

> 'I like change and new things. It's challenging.' (WP2)
>
> 'I think I'm pretty adaptable. I don't balk at change. Change can be good and it's boring to do the same things over and over. But I don't believe in change for change's sake.' (WP7)

'I think I adapt to change quite well.' (WP3)

'Yes, I find it easy to accept change if it is put in place in the right way.' (WP4)

'I see it as a challenge rather than a problem.' (WP5)

'I can't think of any change that's really thrown me. That's life. If it doesn't move forwards through change, it goes backwards doesn't it.' (WP6)

Some had slight reservations in the context of changes in education policy:

'The educational changes were too far-reaching and too quick. But once they were implemented I could see the real benefit of them. But, yes, I like change and new things and experiences.' (WP1)

'I'm adaptable to change, but the rate of change is demoralising.' (WP8)

'The changes in the education system have been too fast and far-reaching, but once we've got used to them and they're fully implemented they mostly work well. When you've been in teaching a while, change keeps you fresh.' (WP5)

This teacher was less enthusiastic about social change:

'...it's hard to be pleased with the changes in society - in the poor parenting skills, language, behaviour – because it won't be possible for the Government or anyone else to turn things around.'

And another highlighted the problems associated with the introduction of new technology, saying that it had been difficult for older teachers whilst younger teachers find it easy:

'Technology in general is problematic for the older staff to adapt to.' (WP7)

Moving further down the scale of enthusiasm for change to the two retired groups, the **retired secondary** teachers, though still with a positive majority, gave more qualified responses. In relation to educational change:

'I had had enough of teaching, possibly because of all the changes we've discussed, and actually sought a change of career as a way out of an unsatisfactory situation.' (RS2)

'I don't like change just for the sake of it and I see some of the so-called education reforms as just that... I think the changes in society are the most difficult to deal with – the way children are today, and parents.' (RS7)

'The changes in education have been more than a small challenge, but I suppose most of all, the way kids behave – or rather misbehave – in school nowadays is a change too far.' (RS8)

Their responses to change in their personal lives were also more mixed, ranging from relatively positive to quite negative:

'I relish new challenges which usually involve change of some sort or another' but 'if you find a school you like working in, why move for the sake of it?' (RS1)

'I think I'm pretty adaptable really and generally find it quite easy to change.' (RS3)

'I wouldn't say I find it easy to adapt to change, but I do like a challenge I suppose.' (RS4)

'I take a while to adapt to change I suppose, but on the other hand I do like a bit of a challenge.' (RS7)

'Well, to be honest, I don't like change.' (RS5)

It is interesting to note that, although these retired secondary teachers gave less positive responses than their working counterparts, all of them have moved on, either to a new and different career, or had continued some kind of involvement in education. So they had embraced significant change in terms of their career.[5] But one teacher had experienced a crisis of confidence in changing to a new kind of work, work that required a very different set of skills from those of a teacher:

> 'I've always been good at whatever I've tried to do and I was really useless at using the telephone, I hadn't used it at work before, and it was partly because I was terrified. I didn't know anything and was quite frightened about picking it up and people were asking questions that I didn't know the answers to. And the property portfolio is constantly changing. I was quite vulnerable and it was quite shocking.' (RS4)

The teacher whose husband had died four years previously, highlighted the way in which our individual response to the idea of change is, itself, a changing process influenced by other events in our lives:

'I realise from recent experience that you go through different phases during your life when you find it more or less difficult or acceptable. For example, when my daughter was small I had a kind of instinct to keep things stable and ongoing and kind of 'safe' for her. I wouldn't have been interested in changing careers or making a big move. Nor was I interested in that after my husband died. But once I started to get back to normal after that, I felt that change and a new challenge would be a really positive and good thing... So I don't think you stay the same necessarily all your life.' (RS3)

Whilst the majority of **retired secondary** teachers were positive, or gave qualified positive responses, the **retired primary** group were significantly more negative about change in their lives. Like the other groups, they mentioned changes such as moving house and educational policy initiatives as having an impact on their lives and decision-making, but this group was alone in suggesting age as a possible reason for their resistance to and dislike of change. Firstly, this is what some of them had to say about educational change:

> 'I think there's been an awful lot of change for the sake of it over the last ten years. Maybe it's a kind of self-justification for the Government but I think, not only in education, they ought to stop changing things all the time. They need to see that sometimes things are OK as they are.' (RP4)

> 'I think that all the changes in schools have been too fast and furious, so that by the time you've sorted out one new idea and come to terms with that, there's another big idea to be taken on board.' (RP5)

> 'I think where teaching and my career were concerned, I didn't like the speed of the change. I had been teaching for a long time and perhaps was a bit set in my ways. The inspections were bad because it meant constant observation and performing. That's just not me.' (RP6)

And on change in general:

> 'I didn't like moving to (this city) to start with but that was because I'd been in London for about 25 years. I hadn't liked moving to London either really because I had a rural childhood.' (RP1)

> 'I quite like things to stay pretty much the same. I'm pretty conservative – that's with a small 'c'!' (RP3)

> 'Change is a modern thing. I think for generations nothing much changed but during the second half of the twentieth century change has been rapid and ongoing... I certainly think that 'if it aint broke, don't fix it!" (RP4)

> 'I suppose I don't really like (change) that much. I missed my family badly when I first moved down here, especially as I have two sisters and we were, well still are, very close.' (RP6)

Dislike of change being an age-related issue, was mentioned by half of the **retired primary** interviewees. One of the teachers (aged about 55) implied that she felt herself to be 'old', saying that 'older people of today have not been used to change' and that she finds change 'not very easy' especially as she gets older (RP7). Other responses included:

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[5] See Chapter 6: 'Research Findings – The Early Retirement Decision.'

'I think that generally the older you get the more set in your ways you become.' (RP4)

'I did find that (the pace of educational change) difficult, but think that might have been an age thing.' (RP6)

'I found it (the 'fast and furious' changes) stressful, but I do believe that it's age-related. The younger ones seem to take it more in their stride.' (RP5)

- **Would the teachers choose teaching if they were starting their careers again?**

As already mentioned in the introduction to this chapter, this question was asked in order to try to assess the link between changes in teaching during the teachers' working lives and the achievement of a fulfilling work/life balance in the context of these changes. Three main themes emerged in answer to this question. Firstly, the relationship between educational and social change and teaching as an 'ideal' career in terms of combining work and family – 'then' and 'now.' Secondly, implicit in the question was the idea of vocation and the extent to which the teachers had found the job fulfilling and rewarding despite their unanimous view that it had changed significantly. And thirdly, the issue of choice was raised in the context of women entering the labour market and making career choices at the beginning of the twenty-first century as opposed to three decades previously. Responses in terms of the work/life balance on these three themes were wide-ranging and diverse both within and between the four groups.

The **retired secondary** group, comprising seven teachers with degrees, were least likely to choose teaching again if re-starting their careers now. But in only one case was this related to the work-life balance:

'...an inner city school, with all its problems, represents a challenge...and if you have a family, juggling all of that can just make a more challenging school too much.' (RS6)

Given their qualifications, today's alternative career options included becoming a journalist, an accountant, a lawyer and working in an environmental setting. One disaffected teacher would choose a job where 'success in your work is more clearly related to success on the career ladder and your bank account!' (RS3) However, if the job was the same as when they began their careers, and the choices available as they were then, they might go for teaching:

'...if I was taken back to 21 and getting my degree in 1974, I probably would choose teaching, partly because the choices back then were limited.' (RS2)

'I'd choose it if we were going back to the seventies, but the way things are now...' (RS3)

'If I was coming out of university now...I think I'd become a lawyer but that's because it's an option for girls nowadays.' But if going back to the seventies: 'I'd probably choose teaching rather than secretarial work or nursing or whatever the choices were in those days.' (RS7)

'If I could go back to the work ethic and classroom discipline that was in place when I started teaching then yes I would, but you can't turn the clocks back...' (RS1)

For others, the changes had gone too far:

'Almost certainly not. For a start, it's not the same job now as it was when I chose it. We just weren't trained to deal with the job we're doing. Even with all our experience, it's almost impossible to keep on top of it.' (RS8)

'No, it was all right in my day but no, from what I see, the behaviour and lack of discipline in certain areas, I think it's a very challenging career now. Although I loved it a lot, I wouldn't want to start now.' (RS6)

However, one of this group would do it all again, though might choose primary teaching rather than secondary because of the 'more close-knit community.' Since leaving teaching, she has been working on an educational project, for a Recycling Consortium, in primary schools:

'It suited me well and I really enjoyed it and it gave me a lot of satisfaction... I suppose having now been into primary schools a lot more, I think that they would be nicer places to work. There's a more family atmosphere amongst the teachers. They operate more like an extension of home in those early years.' (RS5)

In the **retired primary** group, the majority had taken the work/life balance into account when choosing teaching for its supposed convenient fit with family life, but most acknowledged that it could no longer be considered ideal in this respect. For this group, the work/life balance was a more important factor, both 'then':

'It is a convenient career for a woman, or was when I started out.' (RP3)

'I must admit that it's been a really convenient career in terms of being a wife and mother. I don't suppose it's the same now because teachers often don't finish work until 6 or so, then take work home and spend half the weekend at it too. It's certainly not the same job that it was when I started.' (RP4)

'There weren't many choices when we were deciding what to do, and everyone assumed they'd get married and have a family and that whatever job they did would be less important than that. When my children were small the job was ideal, but the job now invades your spare time in the evenings, weekends and holidays' (RP5)

And 'now':

'I would (now) choose a job that was 9 to 5 with weekends off and good holidays! That's what the job was when I started – well, only 9 to 3.30 usually.' (RP1)

'Of course (now) you could be a teacher but just do supply. Maybe that's the answer. That way you don't have to do all the extra things now demanded of you, but you do the part that's always been there and is what it's all about – the teaching.' (RP4)

For one teacher, married to another teacher, it had been doubly convenient:

'It has ultimately been a convenient career, especially as we're both teachers. But it's a different job now. I wouldn't rule it out because I have always found it fulfilling and had job satisfaction. But today it takes up weekends, evenings and holidays.' (RP7)

Like their retired counterparts, the **working secondary** teachers made little mention of the work/life balance in choosing teaching as a career. Only one would definitely not choose teaching again (*'Never, absolutely not' (WS1)*, and she has, since the interview took place, taken early retirement. The majority of this group said they would choose teaching again, whether making that choice at the start of their working lives or now. These teachers had demonstrated a positive attitude towards change as discussed in the previous section of this chapter. Their positive attitude towards a teaching career was mostly related to their high levels of job satisfaction in the context of educational and social change. For example:

'I've always found it very rewarding and satisfying as a job. I love working with children and seeing them learn new things. It isn't the same as the job was when I started but that's no bad thing. There are more ways in which it's better than worse. Yes, call me crazy, but I'd do it all over again.' (WS2)

'I've found it very fulfilling and rewarding as I said earlier. Even though there have been lots of changes along the way, fundamentally the job is the same and I love it, warts and all!' (WS6)

'I've really enjoyed teaching and still do, so I suppose the answer's yes.'(WS7)

'I've loved being a teacher and had great job satisfaction. I'd want to do something with people – young people.' (WS4)

Some acknowledged that now there were more choices available to women, particularly women graduates, the decision would be less straightforward:

'Well there are far more options and opportunities for young women starting their careers today so it's difficult to say. If I was leaving school in 2004, hopefully with 3 or 4 As at A level, I'd possibly go for something in law, maybe a barrister. I don't know.' (WS3)

'There are so many more choices now than there were then. I'd choose it again if you mean 'then' but maybe not 'now'. I might be a journalist or writer of some sort now.' (WS5)

'Now? It's a completely different career now. I'm not sure. It is secure and good for a woman, but nowadays there are many more opportunities, more career guidance.' (WS8)

There was more diversity among the final group, the **working primary** teachers. Whilst two of them simply answered that 'no' they would not choose teaching again, two of the positive responses came from two of the three head teachers:

'Yes, it was the right choice.' (WP2)

'Yes. I think I've been incredibly lucky, I really do. I know a lot of people are unhappy in their work, and here I am at 60 saying I don't actually want to give up.' (WP6)

The remaining four in this group were divided between two who acknowledged that, given greater diversity of choice of careers nowadays, they probably wouldn't choose teaching:

'I think I might find a career that was better paid and probably involved less stress and responsibility...and I could live without the abuse of some of the parents.' (WP1)

'I'm much more aware of the vast array of jobs there are out there. When I chose teaching, we just weren't aware of the options available and today there are so many more options anyway for women. There was no career advice at all.' (WP3)

But there were two who clearly would choose teaching again, simply for love of the job and the children. One felt she was in a 'privileged job', had a good relationship with the parents and felt 'very valued.' The other told me:

'I would probably choose teaching again because it is something I always wanted to do and I enjoy the actual teaching and working with children.' (WP7)

CONCLUSION

The first section of this chapter asked why the women had chosen teaching as a career, and also about their own experience of its perceived 'fit' with family life. Responses to the first question on career choice were broadly similar across the two primary groups and across the secondary groups, but varied between the two sectors. Most primary teachers had trained at a teacher training college and had therefore decided on a teaching career prior to leaving school. There was widespread reference to it being a positive choice and to 'always' having wanted to work with children. Teaching had more frequently been chosen as a career for vocational reasons in the primary groups, though the retired primary teachers appeared to have been less vocationally oriented, with several admitting to choosing teaching because it 'wasn't' something else, such as nursing. A large majority of primary teachers had found the career a convenient one in terms of combining it with family and children in a satisfying work/life balance, though many of them suggested that it was less the case given recent changes in teachers' day to day working lives.

A majority of the secondary teachers had gone to university after leaving school and had only decided to take a post-graduate teaching qualification after their degree. There was some evidence of pre-university vocational orientation and a significant number in this sector had chosen teaching as a result of a positive role model, either a relative or someone who had taught them. Secondary teachers mostly regarded teaching as having been convenient in terms of the work/life balance at the outset but many felt, like their primary colleagues, that the need to work at weekends and during the school holidays meant that this was no longer the case. Teachers in all groups said that their original decision to become a teacher had been made in the context of the limited career options available at that time.

The next section of the chapter looked at marital and motherhood status and found that an overwhelming majority (over 80%) were still in marriages begun in their twenties. Twenty-nine of the thirty-two interviewees were mothers and had taken career breaks or varying lengths to be with their young children, with most returning to work before or at the time of their youngest child starting school. The effects of these career breaks were varied, though generally the effect was less in terms of their careers when it was of shorter duration. Several of the retired primary teachers were dismissive of the effect of a

career break saying that they were not 'career oriented' so a break had no significant impact. Geographical moves had been made either because of their husband's job or because of family reasons such as 'upgrading' their home or moving closer to other family members. In terms of both career breaks and geographical moves, most acknowledged that their husband's career had taken precedence over their own and that it had been agreed that it was their responsibility to take care of home and family with their career being secondary to that of their husband.

Regarding their individual, personal attitudes towards change - not only in their working lives through educational policy changes, but also in social change and change in their individual private lives – there was greater commonality *within* each of the four groups and some noteworthy differences *between* them. The working secondary group was overwhelmingly positive and their retired counterparts similarly so, but with some reservations regarding educational and social changes. However the retired secondary teachers had all gone from teaching either to a completely different career, or to a new career associated with education in some way. Working primary teachers were mainly positive, again with a few conditions, but the majority of the retired primary group had relatively negative attitudes towards change, both in 'work' and 'life', that may have acted as 'push' factors in their retirement decisions.

Asked if they would consider teaching as a career, if making a career choice again, the answers given by secondary teachers, both working and retired, made little or no reference to the work/life balance, focusing more on what different options are now available to girls in making career choices. Whilst the working primary teachers had varied views, retired primary teachers had mostly taken the work/life balance advantages of teaching into account when choosing their career, but acknowledged that the job had now changed to a degree that made it no longer an 'ideal' career for women.

The next chapter looks at the research findings from interview questions on retirement and early retirement.

Chapter 5

CHAPTER 6

RESEARCH FINDINGS – THE EARLY RETIREMENT DECISION

Interviewer: ***Why did you retire from teaching?***

Teacher: ***My heart was no longer in it. I was feeling tired, fed up, stressed, almost making myself ill.'***

Teacher: ***'I'd had enough, and being made redundant was perfect, it was a gift.'***

INTRODUCTION

PART 1: EARLY RETIRED PRIMARY AND SECONDARY TEACHERS

- **Why did these teachers retire prematurely from the profession? When did they first consider doing so?**
- **How do they spend their time in retirement? Do they regret their early retirement decision?**
- **What might have persuaded them to stay in teaching? Would flexible retirement have been an attractive option?**
- **Why do they think some of their colleagues continue to work until 60?**
- **Do they feel financially secure? Did their husband or partner's employment or financial position influence their decision to retire?**

PART 2: WORKING PRIMARY AND SECONDARY TEACHERS

- **Are there any circumstances in which these teachers would decide to retire early?**
- **Have they, at any time, considered a change of career? If flexible retirement were available, would they be attracted by it?**
- **What factors do they think influence their colleagues' early retirement decisions?**
- **Do they feel that they have adequate financial resources for their retirement? Has their husband or partner's employment or financial position influenced their decision to continue teaching?**

CONCLUSION

INTRODUCTION

Whereas questions about the individual lifecourse and the work/life balance in the previous chapter were mainly designed to explore the non-work 'pull' factors that might influence the decision to retire prematurely, questions in this section on retirement and early retirement span both work-related 'push' and non-work 'pull' factors. (These findings link with Chapter 2). Work-related 'pull' factors, such as deciding to move to a new type of work, were also highlighted, particularly by retired secondary teachers. For the majority of the teachers, 'retirement' was defined as retirement from their teaching contract rather than from paid work. Although reference is made to educational policy and the changing nature of the teaching task as factors influencing the retirement decision, the interviewees' views on these *per se* are explored in detail in Chapter 7 – 'Research Findings: Educational and Social Change.'

This chapter is divided into two parts. In Part 1, the findings from interviews with retired teachers, both primary and secondary, will be detailed. Questions asked of these two groups were designed to find out why they had retired and what they were now doing in their retirement, thereby giving an insight into the relevant 'push' and 'pull' factors as well as the degree to which retirement had been a 'choice'. Answers given were similar *within* the groups but significantly *different* between them. They were then asked about their financial position and whether or not their husband or partner had also retired. The aim of these questions was to discover whether or not these might be a 'pull' factor towards premature retirement. Part 2 looks at the answers given to questions about retirement by those teachers who were still working, the aim of which was to explore the reasons why some teachers do *not* retire early and whether they had considered doing so. They were also asked about their financial position and the possible influence of their husband or partner on their remaining in teaching. In addition, all groups were asked why they thought their colleagues had made different decisions from their own regarding work or retirement and, although the answers were a matter of opinion, they seemed to confirm the answers given from the opposite perspective.

PART 1: EARLY RETIRED PRIMARY AND SECONDARY TEACHERS

- **Why did these teachers retire prematurely from the profession? When did they first consider doing so?**

Responses to the question as to why the teachers had retired from teaching were broadly similar within each of these groups, but there were significant and distinct differences between the primary and secondary teachers.[1] Looking firstly at the **retired primary** (RP) teachers' responses, the majority gave changes in the nature of their work, as the main 'push' factor to retirement:

> 'The job had changed out of all recognition from the one I started aged 22.' (RP1)
>
> ...all the extra administration – form-filling, report writing, and paperwork in general.' (RP5)
>
> 'I don't really like change that much and recently the amount and speed of change has meant there's no time to get one change settled in before we're expected to take on another.' (RP6)

Specific education policy changes had acted as 'push' factors influencing the early retirement decision, the most deeply unpopular, for six of the eight interviewees, being school inspections. For example:

> 'I couldn't face another OFSTED...' (RP3, RP4, RP7)
>
> 'I couldn't go through another OFSTED inspection. I just couldn't cope with it again. I found it so stressful and am afraid I'd crack up if I had to go through another one. It's not long until the next one and I'd rather leave before it happens. I have a friend who left before OFSTED rather than do another.' (RP6)

The introduction of technology to the classroom and into the day to day work of teaching over the past decade had been problematic for several teachers in this group, one in particular connected this with her age:

> 'I was still not really happy using computers although I'd been on several training courses. I suppose they're just 'not me'. I think if I'd been using them all my life I'd be fine, but I find it difficult and things take me ages to do.' (RP5)

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[1] The data here are only in response to this particular question in this section of the interview. Reasons for early exit and retirement were also mentioned at other stages of the interview.

The ubiquitous use of computers was described by some as 'intimidating', 'difficult of older teachers to manage,' and 'daunting.' New terminology and jargon were also a source of discontent, and the introduction of 'buzzwords' and 'catchphrases' heavily criticised.

Other changes associated with what one teacher described as 'mood swings in policy' (RP6) were also mentioned as influencing factors. Another suggested that there were alternating phases stressing the 'massive importance' of one area, then switching to another:

> 'The literacy emphasis took too much time at the expense of creativity, so then the emphasis was on that.' (RP8)

The introduction of the Foundation Stage meant that there were 'hundreds of boxes to tick' for each child, and the relevant forms were not available when the policy was introduced. Described by one teacher as a new phase of 'informality', this had followed the 'formality of the literacy hour.' (RP6) The requirement for a profile for each child had meant 'masses of additional paperwork.'

'Informality' had also caused problems for some in terms of classroom organisation, a significantly change from their earlier years in teaching:

> 'I think they should learn to sit still so that they develop good habits and routines for later school life. It tends to make discipline and order more difficult to achieve. Some children can so easily disrupt the rest of the class.' (RP6)

Taken together, these 'push' factors had contributed to feelings of stress, serious enough to influence their retirement decision:

> 'My husband was concerned about how stressed I was and our marriage was suffering because I was working so much in what should have been free time for us.' (RP1)
>
> 'I was so stressed that I often felt I couldn't go on. I got better from the really bad patch and came back to teaching, but from then on I couldn't wait to go.' (RP3)

The link was, therefore, made between the 'push' of stress from the work of teaching and the 'pull' of husband/partner, family and life outside teaching. Family had been a

significant 'pull' factor for several of the retired primary teachers, both caring for their own parents and, for one, a new grandchild:

> 'My mother was ill and I wanted to care for her more than I could if I was working full-time. I realised there were more important things... There's more to life than teaching.' (RP4)

> 'I'd just become a grandmother – my daughter had a little girl – and, well, probably that was the greatest pull of all. I wanted to spend as much time with them as I could. I suppose that's only natural really.' (RP5)

For some, personal factors had been important in the timing of retirement. One teacher said that she wanted to go before she was 'too old to get some enjoyment out of retirement' whilst another had wanted to 'go with dignity' before she was too old.

Besides the significant influence of their parents and grandchildren, the fact that the majority of their own 'children' were adult and no longer financially dependent was an important financial consideration:

> 'My children have both finished university and are now financially independent – more or less!' (RP3)

> 'My own children had grown up and flown the nest and I felt I'd like to spend more time with my husband.' (RP4)

> 'The boys are off our hands...' (RP7)

The financial situation of the **retired primary** teachers was, in fact, one of the most important 'pull' factors influencing their retirement decision. This will be looked at in greater detail later in this chapter in the context of pensions and husbands'/partners' retirement. But it is interesting to see the way in which the decision on retirement from teaching was reached in conjunction with financial considerations:

> 'We looked at our financial situation and decided that, as we felt we could afford to do it (for her to retire), we would.' (RP5)

> 'We decided that, with my husband continuing to work for a few years and then hoping to get a good pension – though you can't really guarantee that now can you? – and we decided that we could afford for me to retire and maybe get a bit of part-time work.' (RP1)

Only one teacher in this group had been offered a retirement package that acted as a 'push' factor towards retirement. The school in which she was working needed to make a

redundancy and had 'earmarked' the teacher they wanted to take it, but that person did not want to leave so she took the opportunity to leave full-time teaching.

In complete contrast, a majority of the **retired secondary** teachers interviewed had done so primarily because of redundancy packages offered as a result of school reorganisation in the city. Six of the eight teachers gave this as the main reason for taking early retirement. For example:

> 'They needed to make two people redundant in that final year and I thought, 'well, this is a chance'. In the science department, four of my close colleagues went on very nice early retirement packages, so the seeds were sown.' (RS5)

> 'I retired mainly because I was offered a really good package when the school I was teaching in was closing. But it was a straightforward decision because I had, in all honesty, had enough. I was very tired all the time and wanted out, so the offer was irresistible.' (RS8)

The two teachers in this group not retiring because of the redundancy 'push' factor retired mainly because they were offered a work-related 'pull' factor from outside the education system, one in partnership with a friend who had opened a shop (RS1), and the other in an internet business (RS7). They also mentioned being 'exhausted' and 'disillusioned.'

As far as non-work 'pull' factors were concerned, none of this group mentioned family or caring commitments apart from the connection with their husband or partner and their financial position, but given that the majority were in receipt of a financial incentive to retire, this aspect was less problematic. One of those not retiring through redundancy had, like her primary counterparts, worked out the financial implications:

> 'I discussed it with my husband and together we decided that I should go for it. I don't get my pension of course, so we did have to make a joint decision because I might not have had much income. But then our children are now both financially independent so I though it would be good to have a new challenge even if it meant being less well off.' (RS7)

Amongst those retiring through redundancy there was a sense of regret at leaving teaching:

> 'I think when you've enjoyed your teaching career, you only leave when circumstances conspire to make possible, or a seriously workable option. I enjoyed teaching at the school I was at, but I would have had a great deal of adapting to do given that I would have had to move to another school.' (RS3)

The responses of those taking redundancy suggested that they regarded their situation as affording something of an opportunity, partly to leave teaching, and partly to take up a new challenge:

> 'I had become increasingly disillusioned and wasn't sure what to do instead, so when this opportunity arose I thought I'd take it.' (RS1)
>
> 'It was a choice I made...This was a gift.' (RS4)

Looking now at *when*, as opposed to *why*, the retired teachers had started to consider premature retirement, there was, again, a difference between the two groups, primary and secondary, partly because so many of the secondary retirees had been offered a retirement package. For the primary teachers, there was a significant time taken from first considering retirement to actually leaving. One of them had first considered it following the 1988 ERA, more than ten years before she retired, though it is difficult to tell how seriously:

> 'I started thinking about it when the National Curriculum was first introduced and I've been thinking about it on and off ever since – when I've had a chance to think, that is!' (RP6)

Two teachers had considered taking the option of retiring at 50, but had been too young to take it before the scheme ended in 1997. Both nevertheless opted to retire early but on a reduced pension:

> 'Some of my teaching colleagues were opting for the retirement package that was on offer, but that ended in I think it was 1998, and I would have had to wait until 60 for my full pension, but I decided to leave anyway.' (RP4)

One teacher in this group had taken an early retirement redundancy package, but the remainder had left because they had found teaching stressful and increasingly difficult to sustain:

> 'I didn't really think about it until fairly recently but I've gradually started to feel more and more tired and my daughter was concerned that I'd make myself ill... I actually retired about a year later. I enjoyed the last year much more because I knew that I wouldn't be working so intensively for much longer.' (RP1)
>
> 'I suppose it was when I became ill with stress, about four years ago. I didn't really want to retire and hadn't thought about it before... But I really found it difficult to cope and eventually decided to throw in the towel.' (RP3)

For the second teacher quoted above, part of her problem had been a 'really difficult class' with 'several badly behaved boys who caused constant disruption.' Another teacher had been discussing retirement with her husband over the years and that they had always planned to retire together, so when he took early retirement it was 'tempting to join him' (RP5).

A majority of the **retired secondary** teachers had retired early on a package offered as part of school reorganisation and not previously thought of it as a serious option:

> 'I didn't really think of leaving teaching altogether until this opportunity came along.' (RS2)
>
> 'Only really when discussions began about closing the school, and it became a realistic option.' (RS3)

One of the teachers who had never married had a slightly different perspective:

> 'No I hadn't thought about leaving teaching until the school was actually going to close. I saw it as a career and, not being married, I put my heart and soul into it.' (RS6)

- **How do they spend their time in retirement? Do they regret their early retirement decision?**

There was, as we have seen, a significant contrast in the factors that had influenced the primary and secondary groups to retire early, and the two groups were also doing very different things in retirement. Looking firstly at the **retired primary** teachers who had, as a group, demonstrated their disillusionment with changes in policy and in their teaching role, together with a 'pull' towards domestic and family life.

In terms of paid employment, six of the eight teachers in this group were undertaking a significant amount of supply teaching. Half were normally supply teaching for two days each week, two of them were regularly teaching for three days and one usually for three and a half days per week. They had left a full-time teaching contract, 'stressed' and 'disillusioned' with the educational changes, yet were returning on a regular basis to the

classroom and primary school environment having technically 'retired' prematurely from teaching. But why?

One teacher summed up supply teaching as follows:

> 'The biggest advantage of supply teaching I think is that you need to turn up just fifteen minutes before school starts and, at the end of the day, when the children have gone and you've tidied up and written down for their teacher what you've done, that is the end of the day, whereas if you're a full-time teacher, that's just the start of the evening shift!' (RP1)

As discussed in the first section of this chapter, one of the most important factors for primary teachers, in the context of educational change, was OFSTED inspections and not wanting to go through the experience again. The non-contractual status of supply teachers meant that they could continue to teach young children without such close involvement with what they believed were the most negative aspects of educational change:

> 'I don't have all the paperwork and report writing, which had become a nightmare. I wouldn't go back to all the responsibilities that go with a teaching contract – and you also earn better money, per hour at least, for supply.' (RP1)

The 'same' job, but with fewer responsibilities in terms of paperwork and administration, was an attractive option for this group, especially given what they felt was a good rate of pay in return for a job that also offered real flexibility:

> 'The advantages of supply are that you can leave at the end of the school day when the kids do, rather than hours later, and no administration. You just teach what you're told to and have no meetings with parents and no planning over the weekends.' (RP8)

> 'I suppose I now feel I have the best of both worlds because I do supply teaching as and when I feel like it – usually for about two days a week, and if I want to go on holiday, I'm not available for teaching and am free to go.' (RP1)

None of the **retired primary** group was doing any paid work apart from supply teaching so the rate of pay was important for those who had retired early with a reduced pension. One teacher said that she had received 91% lump sum and 86% of her pension for leaving three years prior to teachers' retirement age. She found that supply teaching was an ideal way of topping up her income given the attractive rate of pay, and that part-time teaching jobs, which she might have considered, were 'rare.' Another teacher found that

not only was the pay of supply teaching an incentive, but also, from a personal perspective, it enabled her to keep in touch rather than becoming isolated in retirement:

> 'The idea of retiring completely is quite frightening because I'm sure that from a financial point of view I've not made enough provision. It's a lifeline, and financial income, as well as the enjoyment of contact with teaching and the children. I think, at the moment, if I was to give up teaching full-time (completely), I would miss the contact and the stimulation.' (RP2)

Returning to the theme of the work/life balance, these retired teachers, when not supply teaching, spent their time either with family members, doing voluntary work or pursuing interests and hobbies. Time spent with family was, for some, divided across four generations including their parents, their husband, their children and grandchildren. Where their parents were concerned, there was usually an element of caring:

> 'My parents live locally and my father had a stroke. I wanted to care for them and help them. My father has now died and I look after my mother and take her shopping.' (RP7)

This respondent's family involvement spanned four generations:

> 'I spend more time with my family. My father hasn't been well and I have more time to see him and help my mother out with him...and my daughter is expecting her first baby so I'm looking forward to spending a bit of time with her – well, it'll be <u>them</u> soon.' (RP1)

Where voluntary work was concerned, some made brief reference to, for example, 'doing a bit of voluntary work' (RP5). One teacher, who was not doing paid work, gave details of her charitable involvement and seemed to enjoy this alternative kind of work for its flexibility, in a similar way to those doing supply teaching:

> 'I work in a charity shop... I can walk away at the end of the day with no responsibilities and I can also say I'm unavailable whenever I want.' (RP7)

She also works in a café for relatives visiting the local prison.

As far as hobbies and interests were concerned, some were catching up with household DIY and gardening that had been neglected when they were teaching full-time, and were finding such jobs more easily undertaken now that they were less tired and stressed:

> 'I'm much more relaxed now and doing various things, some I'd planned to do, some new things. I even enjoyed decorating the bathroom. That's a job I would have hated before...' (RP3)

Everyone in this group of teachers mentioned their own hobbies including both current and possible future interests:

> 'I've started to enjoy cooking more and spend time making new dishes. Before, I'd just rush in and throw something together, but now I'll look up a new recipe so we're eating like kings.' (RP1)

Other hobbies included reading, yoga, badminton, art classes, pottery and travel. Travel often involved their husband or partner, and the extra time for joint pursuits together with their own more relaxed lifestyle had for some resulted in better relationships:

> 'I'm so much more relaxed now that I can really enjoy life more, and my relationship with my husband is much better now I'm not stressed out all the time.' (RP1)

> 'I have more time with my husband, for life in general, and to travel which we always said we hoped to do. We've been away on a wonderful holiday to see some cousins in Canada... We took the holiday during the term time, which made a nice change.' (RP5)

Another teacher, in anticipation of a long holiday with her husband in France next year, had started to 'brush up' her 'schoolgirl French.' In retirement she felt she had the time and energy to do so that she would not have found whilst in full-time work.

When asked whether or not they regretted leaving their full-time teaching post, the **retired primary** teachers were unanimous in having no regrets. Several did, however, point out that in continuing with supply teaching, they had retained a relatively high level of contact with teaching and the school environment, whilst avoiding the stressful aspects of a full-time contractual commitment and had achieved an ideal balance with their family lives.

Looking now at how the **retired secondary** teachers were doing following retirement from their full-time teaching post, it is interesting to note that, in contrast to their primary counterparts, none of these interviewees mentioned their husband or family when describing and explaining how they now spend their time. Although, as shown in the previous section, many teachers in this group were disillusioned with their teaching

career, several had nevertheless continued their involvement with education in one way or another, though none was supply teaching. For example:

> 'I work three days at the college. One of those days is liaising with schools. Then the other two I'm setting up courses like nursing, hairdressing, motor maintenance, construction, IT, catering, beauty. So now with the Thompson Report there's more emphasis on this kind of thing and vocational courses.' (RS6)

The other teacher still involved with education had started work for the Recycling Consortium, which involved going into primary schools and offering courses to educate children about recycling. A third teacher had initially worked in education as a course manager, describing herself as 'just the dolly bird at the front!' (RS4). Of the remaining four, two had gone into business with friends, one in an internet business and the other in a boutique and the others were in office-based jobs.

The significance of skills, was mentioned by a majority of this group not only in using their transferable skills from teaching in other jobs, but also adding to their skills in areas that they felt might be necessary or advantageous. The skills that they felt they already possessed and had used in teaching included organisational and communication skills and high levels of literacy and numeracy:

> '...so what I do now is organise staff to run courses and then speak to parents, set up report systems...so I've taken all my skills that I had for teaching and am re-using them in a different environment.' (RS6)

But despite their experience in using computers in schools, some nevertheless felt a need to improve IT skills for the job market:

> 'When I first left teaching, I went on some IT courses because, although I'd used computers in my job, I didn't know how to use some of the popular packages and I thought it would be a good idea to be up to date with everything.' (RS2)
>
> 'I did some IT training as part of my jobseeker's allowance, then worked as a temp in all sorts of different places which was an eyeopener.' (RS3)

The change from the institutional environment of the school to a more flexible job had been significant in terms of adapting to a very different world of work. But, generally, this group of teachers seemed to regard their situation as providing an opportunity to take up the challenge of a new and different kind of work, as stimulating rather than problematic:

'I've joined in with this at a time when there's a lot of change happening, so that's quite exciting...' (RS6)

The majority of this group was working about four days a week, and had established a new work/life balance. A less stressful working environment, together with changes in work location and hours allowed for more leisure:

'I work four days a week which is just right because it means I still earn quite a good income, but also have a day off each week to 'catch up' with other things. We wear a kind of uniform, which is good because I don't even have the stress of deciding what to wear in the morning.' (RS2)

'...and then I started in the estate agency which was completely different. You get fully involved with it because it's a small business, but you come out at the end of the day and can leave it behind.' (RS4)

Did teachers in this group regret their decision to retire early? Although a majority of this group had left because of school reorganisation, most had been given an option to move to a different school, so their 'decision' to retire was based on a choice between moving schools or retirement. Several had no regrets at all and had not looked back on the decision as the wrong one, whilst others had taken away many positive thoughts and experiences, but would still not choose differently if given the option again:

'No, but I've come away with such positive thoughts about teaching and my teaching career, leaving on a high.' (RS6)

'Occasionally I wish I was still teaching but, to be honest, only when it's school holidays and I'm working! I thorough enjoyed my teaching career, but had done it for a long time and really needed a change so when the chance came to leave, I saw it as an opportunity not to be missed.' (RS3)

Others felt that not continuing had, to some extent, been age-related and connected to feelings of inadequacy, and they did, therefore, have some regrets about the ending of this phase of their lives:

'No, I was getting less job satisfaction and more stressed as the years went on and I simply didn't think I was doing that good a job as I had done in the past. I realised that I was finding it more and more difficult to keep on top of it all. That's perhaps just an age thing, but at least I was able to understand it and realise it was happening.' (RS1)

'Yes I'd still love to be doing A level work but, in teaching, I was spending more and more time staying on top of things because the old brain wasn't as good as it was. My memory is not as good as it was and I was having to write a lot of stuff down. And trying to learn their names...' (RS5)

- **What might have persuaded them to stay in teaching? Would flexible retirement have been an attractive option?**

Half of the **retired secondary** teachers interviewed would not have retired from teaching had they not been offered a redundancy package as a result of school reorganisation:

> 'I'm sure I would have stayed in teaching until normal retirement age if there hadn't been change afoot.' (RS3)

> 'I would have gone on teaching if the school hadn't been closing. I didn't really want to leave teaching, I would have gone on until the bitter end. I thought I was a born teacher and I wanted to either be right in there, or not there at all.' (RS6)

Asked whether or not flexible retirement would have been an attractive option, the group was divided. Negative responses were usually associated with disillusionment with teaching and self-doubt connected to ageing, and the desire for a complete change of career:

> 'I had begun to find it quite tiring and, as I said, I didn't feel I was as good at it as I had been at one time. And I welcomed the chance to do something different, to start again.' (RS2)

> 'Physically I'd had enough anyway. It's very exhausting particularly as you get older. But I viewed it (her retirement package) as an opportunity to do something different. I'd been in teaching a long time... I'd had my share of stress.' (RS4)

On the positive side, one interviewee's response was:

> 'That would have been a very attractive idea. It's very much an all or nothing situation regarding pensions, and it seems such a waste of such a wealth of experience when teachers retire early.' (RS8)

Looking now at the **retired primary** teachers' responses to questions on what if anything might have persuaded them to stay in full-time teaching, their answers were mixed. One teacher simply 'didn't want to go on doing it' (RP3), whilst three of the others might have continued given the option of a job share or part-time work:

> 'Maybe the offer of a jobshare or part-time. But I'd had enough (of full-time) and was completely fed-up with the way everything had changed. Not all the changes were bad in themselves, but trying to put them into practice was almost impossible.' (RP6)

The rest of the teachers in this group might have been persuaded to stay if some of the policy changes were abandoned, parents' and children's behaviour improved and salaries increased:

> 'It would have to be too many things – less administration, better behaved children, better pay – so, no, I don't think that would have happened. Plus of course abolishing OFSTED or at least changing the way it's done.' (RP1)

> 'Well, a serious reduction in paperwork would have been good, plus some magical improvement in children's and parents' behaviour! Both would have reduced stress and the reduction in admin would mean less working in the evenings and weekends.' (RP4)

When asked for their views about flexible retirement, most acknowledged that in undertaking significant amounts of supply teaching they were constructing their own form of flexible retirement. They had not left the teaching profession, but were continuing to work and earn money whilst either in receipt of a reduced pension or with a pension forthcoming at 60. They were mostly in favour of a more formally defined flexible retirement in which they could work part-time and receive part of their pension:

> 'Giving up my contract and continuing supply is a kind of halfway house. But I do think that a more formal flexible retirement would be a good idea. You could have a part-time contract and take part of your pension.' (RP1)

> 'I do miss it in many ways (this respondent does not supply teach), and perhaps if I could have gone part-time, or had half my pension and continued to work it might have been a good option. I read somewhere that the government was giving a kind of lump sum to doctors who've worked for the NHS for thirty or so years, as a kind of thank you, and that would be a very good idea for teachers. It certainly might make them feel more appreciated and give them a boost that might encourage them to stay.' (RP5)

The idea of job sharing was, for some, an attractive option:

> 'In my early fifties I would love to have done a job share. I know someone who does it and it seems to work well. Two teachers can often complement each other because they may well have different interests.' (RP6)

- **Why do they think some of their colleagues continue to work until 60?**

Although the answers to a question that asks why those already retired think that some of their colleagues have not done so is merely a matter of opinion, it nevertheless might shed

some light on perceived differences between the groups. Similar reasons were suggested across both the **primary and secondary** sectors, and were divided into two broad areas: positive and negative reasons for staying. The most frequently negative reasons mentioned were financial, lack of choice or opportunity for an alternative and lack of self-reflection regarding their own capabilities. Financial reasons were linked with relationships and the pension position:

> 'Financial necessity probably, or lack of alternative viable ideas for employment and income.' (RS1)

> 'Probably people who have to for financial reasons. Maybe those who are on their own and have to support themselves and perhaps a family too. They may need to work until 60 to as to maximise their pension.' (RP6)

The negative reason of lack of alternative opportunity was given in terms of some teachers being trapped in their job, as well as being the kind of people not interested in trying something new:

> 'Well many don't have the opportunity or choice to retire earlier, but apart from that, teachers have widely differing energy levels, commitment to the work, tolerance and so on.' (RS8)

One teacher felt that there was a tendency among some teachers not to realise their reduced capabilities in respect of their work:

> 'Some of them don't realise that they're not as good as they used to be. They don't have the self-reflection. But I didn't want to stay there and not be as good. They're doing an OK job but don't have that enthusiasm and energy and drive that they had before.' (RS5)

On the positive side, it was felt by some retired teachers that their colleagues were more devoted to the work of teaching and attracted by a more secure employment than might be available outside the educational system:

> 'It really is potentially a very tiring job and some people can't cope with it as they get older. It's the energetic ones, and those who are really dedicated teachers who carry on until the end. Some people just love it and it's a positive decision to carry on, others have no choice, and it's a negative thing.' (RS8)

> 'Some of them just love the job of course and, if they have gone for promotion and become heads or deputies, they are at the chalkface less and spend less time amongst the day to day stressful things like classroom control and discipline. They're also better paid if they've been career oriented and got promotion.' (RP1)

Other positives included holidays: 'glorious holidays' (RS4) and the idea that 'long holidays must be a temptation' (RS2). But several of these teachers acknowledged that personal characteristics could be an important factor, again demonstrating the differences *between* individual women and their perspectives on change:

> '...some people don't mind constant change as much as others. Also some people react better to stress, or even don't experience it in the same way and some people are naturally more calm and controlled than others.' ((RP3)
>
> 'Some people just don't like change and feel scared of trying something new. But as it is, they're stuck dealing with the changes in education and in pupils' and parents' behaviour and I think that's worse.' (RS3)

Interestingly there was a widespread view amongst **retired primary** teachers that their colleagues would retire if it were a real option:

> 'I think that most people with a realistic choice would leave. Having said that, a lot of teachers, particularly women, have a kind of sense of duty which for some means that they feel they're giving something to the next generation in a vocational way.' (RP4)
>
> 'I think that anyone who had a genuine choice would retire as early as possible.' (RP6)

- **Do they feel financially secure? Did their husband or partner's employment or financial position influence their decision to retire?**

All eight of the **retired primary** teachers and seven of the eight **retired secondary** teachers are married or have a long-term partner and the influence of husbands might be an important factor in these teachers' retirement decisions. Of particular interest here was whether or not their husbands have retired, and their financial position.

Looking first at the responses given by **retired secondary** teachers, all their husbands were still working, five of them in the teaching profession, but only one considered that her retirement decision had been made independently of her husband:

> 'It was completely separate. He decided, when he had a couple of years before retiring, what he'd do. He started buying property in 1993 before he finished. He's spent the last ten years working on property practically full-time. I see him less now than I did when we were both teaching.' (RS4)

The others all acknowledged that the retirement decision had been a joint one and that their husband's work status and income had been factors in that decision:

> 'We've always worked as a team so it was a joint decision. By working a few years more, until 60, his pension will be enhanced so it made sense. On the other hand, because I was offered a package, it was financially a good move anyway.' (RS8)

> '...he doesn't have any intention of retiring for many years. He wants to work forever so if I left teaching early I wanted to have something interesting and fulfilling to do with my time.' (RS1)

The teacher who was not married had a partner who had retired, but she made work-related decisions independently of him. They spend time together when she's not working but keep their finances entirely separate:

> 'I work a bit less and play more golf. We like to do things together, but I don't think I could be at home all the time. He was an accountant. He wouldn't persuade me not to work. I do my own thing, I need my own space and we don't live together.' (RS6)

All eight teachers in this group said that they felt financially secure. The majority had paid off their mortgages, some using lump sum payments from their redundancy package, and all had savings:

> 'We've saved over the years and he has a good pension. I have a pretty good pension and paid into a personal pension when I wasn't working.' (RS1)

> 'That's a good thing about teaching – good pay, good pension – and I think that's another reason why I went into it – to feel financially secure.' (RS6)

All eight of the **retired primary** teachers were married: four of their husbands had retired, and four had not. Only two were married to teachers. The four who were married to non-retired husbands had all made a joint decision regarding their retirement on the basis of finances and their husbands not wishing to retire early:

> 'We planned and agreed that he would continue to work full-time until next year partly so that I could retire early.' (RP3)

Another couple had agreed that he would continue to work full-time until 58, then they would live off savings for one year until he got his full pension (RP7).

As far as those with retired husbands were concerned the decision had also been a joint one, based on spending time together in retirement:

> 'We planned our retirement together so that we could have leisure time and family time to enjoy.' (RP5)

Regarding financial security, responses were mixed. Whilst none felt that they were insecure, their answers were more qualified:

> 'I do (feel financially secure) apart from the insecurity over pensions generally. I'm worried that something drastic might happen to my husband's pension now that so many schemes have crashed. But I think we're pretty well prepared and have planned it as far as we can.' (RP1)

> 'We don't have a mortgage and when I was ill we realised that health is more important than money anyway. I now feel that even if we aren't exactly rich, I have my health back and that's fantastic.' (RP3)

In fact, all the teachers in this group either have no mortgage at all, or only a 'minimal' one, and seven of the eight have savings. Only one had not saved, and for rather an unusual reason. Her parents had both died at a relatively young age so she described herself as taking 'rather an ostrich-like attitude,' feeling that she would rather enjoy any money she has now rather than struggle to save for an unknown and uncertain future.

In Part 2, the responses of both primary and secondary teachers who were still working full-time are detailed. The questions asked were designed to explore the other side of the argument, looking at each issue from an opposite or counter-perspective.

PART 2: WORKING PRIMARY AND SECONDARY TEACHERS

- **Are there any circumstances in which these teachers would decide to retire early?**

Teachers who were still working appeared, from their responses, to be significantly more attached to their work as a teacher than the retired groups had been. Seven of the eight **secondary teachers** had not seriously considered any circumstances in which they might retire early:

'I have no plans to retire early because I enjoy teaching, school life and the kids, when they're behaving themselves and no-one's being disruptive. I don't know what I'd do if I didn't teach.' (WS2)

'I've always thought I'd carry on 'till retirement age but perhaps if I won the lottery or something I might leave. The trouble is that I like being busy and active and I also like a challenge and I don't know whether retirement would provide that. I suppose you could take up new interests and things, but for now I'm not ready for that.' (WS3)

Other **working secondary** teachers enjoyed their work but also felt that they needed to keep working for financial reasons:

'I enjoy the job and find it challenging... I like being busy and have plenty of things I'd like to do if I had more time, but I'm not ready for that yet. I don't think I could afford to at the moment anyway.' (WS6)

'I'm the kind of person who likes to keep busy and, at 52, have no intention of retiring. I can't afford to anyway since my divorce. I'd like to meet a rich man, but even then I'd still want to work!' (WS8)

This group of teachers also expressed some age-related and health concerns, their own and their family's, and found the work increasingly demanding with age. For example:

'Some mornings I just feel physically less able to deal with the pace and hectic environment which the classroom and school can be. That's just an age thing I suppose... I suppose if my husband was say seriously ill I'd consider teaching less or not at all if he needed my full-time care and attention.' (WS2)

'Well obviously if I couldn't physically do the job but it's not part of my plans. I'm losing my hearing and I've just started wearing a hearing aid. Now that, in a classroom, is really hard. It's actually not very effective because it amplifies all the background noise... If my hearing gets worse and worse...then I'll have to reconsider my plans.' (WS4)

Just one respondent had recently been offered redundancy for the end of the school year, and was eager to leave:

'I can't wait. I'm counting the days. I was quite ill a couple of years ago... I know that there is absolutely no way that I have the stamina or the enthusiasm to carry on working until I'm 60.' (WS1)

This teacher had considered giving up her managerial responsibilities as an Assistant Head and returning to the classroom, but gave two fundamental reasons for welcoming the opportunity for early retirement:

'What I see as being the problem is the demands in the inner city being so great that however hard I work, I can't actually meet them. I can still do my best for the children,

but in the end I know that I can't meet the demands which others expect. So that's one thing...

...but the second thing is, to have to go through the OFSTED again. I know I keep coming back to it but really they are terribly stressful, I just think it could be too much. Being in the senior management team and having to try to carry people through and lead people through, being responsible for other people – I really don't think that I could do that.' (WS1)

In the primary sector, promotion was a work-related 'pull' factor. As already discussed, three of the eight teachers in this group were headteachers:

'Being a head makes a difference. I was ill last year and had I been a classroom teacher I don't think I would have come back, but with my job I can have periods of time in the office, spend time in the classroom with the children, spend time with colleagues – it's wonderful. And you put up with the stress because it's so little compared to the job satisfaction for me.' (WP6)

Half of the **working primary** teachers said that would retire early if they could, for example:

'I'd like to retire soon because I feel I need a rest. I feel tired and want more time for myself but it's not really possible financially because I have a 16 year. old yet to go through university.' (WP2)

Two teachers made reference to policy changes, in particularly their timing in these teachers' workspan, as having affected their enthusiasm for continuing to teach:

'I feel so tired but I love the job and the children. If there was no paperwork, I would go on teaching forever!' (WP7)

'If you've been doing it for years and you haven't had a break, you get tired and, with all the changes we've had, the wheel keeps coming round again – changes and adapting to them, then more changes... For teachers of my age, the really big changes have been towards the end of our careers.' (WP3)

- **Have they, at any time, considered a change of career? If flexible retirement were available, would they be attracted by it?**

Testament to their declared enthusiasm for teaching, an overwhelming majority of all the interviewees still working had never seriously considered a career change. Reasons given included their enjoyment of teaching, the advantages of job security and pension

security, and the need to earn an equivalent salary elsewhere if making a change. Most of these qualified reasons were from secondary respondents:

> 'I actually haven't because I've really enjoyed teaching, and also you get to the stage where your salary is such that you'd never get a similar one and your pension's building up.' (WS1)

> 'I'd rather have the security of the teaching job. Even though there have been big ups and downs during the time I've been teaching, at least the job is always there in a way. And the pension is pretty secure, not like some of the private sector pensions these days.' (WS6)

One of the **primary** respondents had considered an alternative career, but decided that it was not for her:

> 'I have a friend who works in Tesco and when she described her work package and perks and discounts and pension and discount on insurance - I wondered if I could do it. But I think I'd go mad with boredom. It wouldn't be challenging enough and there would be stresses of a different kind I suppose.' (WP1)

Two teachers described their experience of a long-term teaching career as, in itself, something of a career change and challenge:

> 'I wouldn't really seriously consider doing anything else and, although I like new challenges, teaching is changing so much all the time now that it feels like a different job over time.' (WS2)

> 'I taught in a junior school for 5 years before I had my son and then thought I might do something else, but since I've come back there's always been a new challenge.' (WP6)

In connection with the question about career change, and with the following question on flexible retirement, the teachers were asked for their views on supply teaching and whether or not they might do it as a way of partially leaving the classroom and taking advantage of a flexible 'semi-retired' status. Like their retired counterparts, a majority of the **working primary** teachers said that they would do supply teaching, whilst the **secondary teachers** were less enthusiastic:

> 'I can't walk into a classroom without controlling it and making certain that the children are learning, and enjoying learning. To sit through lesson after lesson giving out some sort of work, not being able to control their learning – I just don't want to do that. I really wouldn't want to go into a school where I'm not known. It's a soulless occupation.' (WS1)

> 'I don't think it would be for me because for me it doesn't have any of the things from which I get my job satisfaction. No, for me, job satisfaction is the main thing.' (WS4)

Asked for their views on the idea of flexible retirement or semi-retirement that might, for example, combine receiving part of their pension with part-time teaching, there was widespread enthusiasm across both the **primary and secondary** sectors:

> 'If I could work part-time and claim part of my pension, that would be great.' (WP1)
>
> 'Yes, I would like a partial retirement plan and part-time work.' (WP4)
>
> 'If there was a scheme where you could work less and take part of your pension I might consider retiring at say 55, but I don't suppose they'll bring that in because it might encourage even more people to go early.' (WS2)

Two of the teachers with responsibility for staffing were very positive about the idea of flexible retirement. Firstly, a primary headteacher connected the working/pension issue with the loss of good teachers from the profession because of taking time out:

> 'Hmm...I think that's a brilliant idea! I think it's a pity you can't do it. If there was an option of getting some pay and some pension I think it would be great.' (WP6)

Secondly, a secondary Assistant Head felt that it would ultimately happen out of necessity, given the current recruitment crisis, particularly in inner city schools:

> 'I think it will be essential. We're having such difficulties in recruiting now and I really do believe that within the next five years it will become a massive problem. And more so with schools like mine, because teachers will not go there if they have choices. For example, in my husband's school (he is head of a large comprehensive outside the city) – it's a very well thought of school, nationally recognised, he will get something like, maybe, 30 applicants for a post where I might get only 2.' (WS1)

Finally, one of the teachers felt that, whilst it was not for her, it was already happening in terms of supply teaching:

> 'I want to go on earning a full-time salary while I can, but I think it would appeal to some of my colleagues who would love to retire early. Although some of them go back to supply teaching after they supposedly retire, so that's a kind of partial retirement really isn't it?' (WS6)

- **What factors do they think influence their colleagues' early retirement decisions?**

As with the 'opposite' question asked of the early retired interviewees about their working colleagues, the responses to this question were based on opinion, but they also give an insight into the broader picture of colleagues within their own particular school environment as well as other teaching friends and acquaintances. Similar factors and reasons given for early retirement were found in the responses of both **primary and secondary** teachers. Work-related 'push' factors were given by many as the perceived reason for early retirement. These included stress, work pressures, paperwork and long hours:

> 'I think it's because of the stress and the paperwork. A certain amount has always been there, but the additional paperwork now, and the planning and the meetings. We have meetings before school, sometimes after school, sometimes on Saturdays and there's so much administration for all teachers, not just heads.' (WP3)
>
> 'Probably because of the paperwork and the out-of-school work. There's a lot of mental stress...you're always accountable, never free and your mind can't switch off.' (WP7)

Stress and tiredness leading to ill health and early retirement was mentioned by several respondents, and connected with non-work 'pull' factors of husbands and families:

> 'I think a lot of people retire early because of tiredness. A lot of women I know have retired because their older husbands have retired and they want to be at home, maybe not all the time, but they retire and take a little part-time job or something and come back as a learning support assistant.' (WS1)
>
> 'I know some who have got so stressed that it's made them ill and they've taken retirement. And others who retire because their husband's retiring and, if they can afford to, they both retire together.' (WS3)

The connection was made between all the various factors and change - social and educational change and individuals' changed circumstances, both at home and at work:

> 'I think it comes down to change in various ways. Some people can't cope with the changes in the education system, some can't cope with a change of head, others have other changes in their lives such as their husband retiring, or inheriting money or something which draws them away from teaching.' (WS2)
>
> 'Mainly it's because of not being able to adapt to the changes. Some can't take on board ICT that is essential nowadays. Some are just exhausted, but I think that's related to feeling depressed by the changed working environment.' (WP1)

Two teachers felt that it was simply a matter of individual personal circumstances in terms of husbands' retirement, financial resources and the way in which they as individuals respond to pressures such as change and stress. And one head teacher told how one of her staff had retired early and returned as a supply teacher, telling her that

> 'It's absolutely brilliant. I don't have to plan for the week, I don't have to take on administrative tasks, I don't have to spend my Sundays doing work' (quoted by WP6).

The attractions of supply teaching, particularly in the primary sector, appeared to be an important factor both to those who had retired and as perceived by those still working. Working primary teachers also saw it as a possible source of income as well as a way in which to remain connected to their schools and children in their future retirement.

- **Do they feel that they have adequate financial resources for their retirement? Has their husband or partner's employment or financial position influenced their decision to continue teaching?**

There was a significant difference between the two groups of working teachers in terms of their planning towards having adequate financial resources for their retirement. Looking firstly at the **primary teachers**, they were all married and most of their husbands were also still working. Asked whether or not they felt that they would be financially secure in their retirement and were adequately prepared in terms of financial resources, only one, a head teacher, answered 'yes' unconditionally. Another head teacher gave the only other positive response, though on condition that she continues to work until retirement. Her husband had already retired:

> 'Yes my occupational pension is pretty good. If I'd gone early I would have had a reduced pension and that gives you an incentive to keep going for those last few years. My husband had to retire early because of ill health which is probably one of the reasons why I've struggled on to 60.' (WP3)

The other six teachers in this group described themselves as not feeling that they would be financially secure in their retirement, though some did acknowledge that at least their teachers' pension, even if reduced, would be a source of some security:

'I wouldn't starve, but don't feel I've got enough to exactly live it up.' (WP1)

'I feel that we're lucky to have a teachers' pension. I'm so aware of people who haven't. But 'adequate'? Bringing up three children and having a large mortgage doesn't leave much leeway.' (WP6)

Some had a few savings described as 'not very much' and 'miniscule', whilst four said that they had none at all. When asked whether she felt that she would be financially secure in her retirement, one teacher exclaimed:

'No! Help! Because I'm stupid!' (WP4)

Asked whether or not their husbands' financial or retirement position had influenced their decision to stay in teaching, seven of the eight teachers said that it had done so. One was still working because her husband had retired early through ill health, whilst the husband of another had chosen to retire early from teaching and although, as a head teacher, she is happy to continue, she felt that her options had been limited:

'My husband decided he wanted to give up teaching when he was 57 so he tells everyone he's a 'kept man' now! He then had no income at all so I kept going anyway. I was happy to, but it would have been different I suppose had I wished to retire.' (WP6)

Others had always made joint decisions on finances and the timing of their retirement. The husband of one respondent had been head of a primary school when he had a heart attack. Instead of returning to his former post, he became a consultant head with the Study City's Education Department where, according to his wife, 'he's paid more as a consultant than he was when he was actually running a school - crazy isn't it!' (WP7)

The **secondary teachers** had made significantly greater preparation and had seriously considered their financial resources for retirement either individually or jointly with their husbands. Six of these teachers were married and one single but with a non-resident partner. The eighth was divorced and had a very different financial position from the others. Following her divorce, she needed to keep working for financial reasons, though she clearly also enjoys her job:

'I have no savings and a big mortgage that I'm solely responsible for because I'm divorced. My daughter is at university and my ex husband is helping fund her for that. I have to keep working for financial reasons, but I like doing it anyway. I only had five years out so I should get quite a good pension.' (WS8)

All six married teachers had husbands who had also not yet retired and all felt that they had adequate financial resources for a comfortable retirement, though one declared herself 'not very financially literate' (WS4). Most of this group had paid off their mortgage and those that hadn't were planning to do so, using their lump sum payment, on retirement. All of this group also had savings or had made additional contributions into their pensions to enhance them. The unmarried teacher had also paid off her mortgage and saved, and felt herself to be financially secure, particularly as she had taken no career breaks:

'...because I've worked all the way through and will get full pensions. Also I paid off the mortgage as quickly as I could when I was on my own and since then have managed to save a bit.' (WS3)

Those teachers in this group who were married had all made their decision regarding continuing to work in conjunction with their husbands. A majority planned to retire at the same time:

'We decided some time ago that we'd probably retire at the same time. We're the same age and both teachers, well he's a head teacher, and it seems to make sense so that we can go on some nice holidays, and we'd both like to go to the gym which we don't have time for now, and long walks and things.' (WS6)

'We both plan to work until retirement age. If he was retiring early or already retired I might well decide to too, so that we could do things together.' (WS1)

The husband of one of the teachers was self-employed and that had affected her retirement plans and was a consideration in the context of financial resources:

'He's self employed and therefore there's that slight uncertainty because he's in a situation where he can't see ahead and know exactly what he'll be earning in the future. So that makes it a bit more difficult for me to say that I'll finish at 55 or whatever. He's earning a lot more than I am, but it changes from year to year.' (WS4)

One couple, not planning to retire at the same time, had already planned their future domestic division of labour:

'He will retire before me and loves cooking and things, and has every intention – well, I'll believe it when I see it – of cooking and housekeeping then. It sounds great, the idea of having a house husband!' (WS7)

CONCLUSION

One of the most interesting aspects of these findings was the way in which the responses to some questions were very similar across a particular group of teachers, with differences *between* groups, whereas others uncovered significant differences *within* the groups.

For most retired primary teachers educational change, in terms of policies such as the National Curriculum, SATs and OFSTED, was a significant 'push' factor together with the associated stress of the pace and far-reaching nature of the changes. Their families were powerful 'pull' factors and they referred to their premature retirement as a 'choice.' Another similarity between teachers in this group was that most of them were supply teaching for two or three days per week and pursuing hobbies, doing voluntary work and spending time with their husbands and families in their new 'retired' work/life balance. They expressed little or no regret at their decision and considered that they were enjoying a 'flexible' retirement in combining supply teaching with other interests.

The retired secondary teachers, in contrast, had mostly retired because of educational change in the form of the 'push' factor of school reorganisation and, as a consequence, being offered the 'choice' of a redundancy package or a move to a different school. They had 'chosen' premature retirement and, rather than supply teaching in their retirement, had all moved to a new career, some still in the education sector but mostly outside. They were mostly working four days per week and spent the balance of their time on hobbies, with little mention of family as a 'pull' factor to retirement. Most of their husbands were still working. For two of this group, the offer of involvement in a business venture outside education had been a 'pull' to a different working environment. Teachers in this group saw their premature retirement as an 'opportunity' but were divided as to whether or not they regretted leaving their teaching career. Some had found significant job satisfaction, albeit often in earlier years, and would have been happy to remain in teaching in different circumstances. The group was also divided on the question of 'flexible' retirement with some preferring the 'all or nothing' approach, and others regarding it as an attractive option. Some of them felt that they could not afford to retire, whilst others were well prepared, so there were differences in financial preparedness for retirement between teachers in this group.

In looking at why their colleagues had not made similar decisions over premature retirement, those who had already retired thought that their working counterparts would retire if they were in a position to do so, this being mainly connected to financial resources. They were also seen as disliking new challenges and preferring the security and safety of a teaching career. Those still working saw their retired colleagues as not coping well with change in terms not only of policies, but also social change. They referred to teachers leaving because of stress, tiredness and ill health. A connection was made between changes in terms of their work, and also change at home such as their husband or partner retiring and 'pulling' them towards a retirement decision.

Amongst working primary teachers, some would retire if they could, or were offered a redundancy package. Several were tired, and felt they were coping less well with the demands of the job as they grew older. However others were still enjoying the challenge of teaching and seemed to accept the work-related changes and adapt to them more readily. Working secondary teachers mostly had no plans to retire early apart from one who was retiring at the end of the year on a redundancy package and was 'counting the days.'

So there was diversity both within and between the groups of teachers interviewed regarding the 'push' and 'pull' factors influencing their retirement decisions, though all had been affected in a significant way by the educational policy changes of recent years. These changes, together with social change connected with parents and pupils, are the subject of the next chapter.

Chapter 6

CHAPTER 7

RESEARCH FINDINGS – EDUCATIONAL AND SOCIAL CHANGE

Interviewer: ***'What do you think of the changes in the education system that have taken place during your time in teaching?'***

Teacher: ***'It's not only changes in the education system but social change that's affecting school life today.' (WP2)***

'Not only is the speed of change a problem, but also the sheer number...and then there's the changes to the changes!' (RS7)

INTRODUCTION

- **What do these teachers think of the changes in the education system during their time in teaching?**
  - **Educational change in general**
  - **The National Curriculum**
  - **SATs and league tables**
  - **OFSTED inspections**
- **And have children changed? What about their parents?**
- **What about stress? And job satisfaction?**
- **Do they think that the professional status of teachers has changed?**

CONCLUSION

INTRODUCTION

The central research question that this section of the interview sought to address was: Do work-related factors 'push' women teachers from the profession into early retirement? Interview questions were designed to discover the extent to which educational policy changes, together with social changes in the context of pupil behaviour and parental involvement in education, may be factors in women teachers' early retirement decisions.[1]

Firstly, the teachers were asked their views on, and reactions to educational policy changes during their careers. As discussed in Chapter 3, there has been a multitude of far-reaching changes, particularly since 1988. Secondly, questions explored social change in terms of pupils and their parents. Thirdly, questions were asked about the teachers' own individual experience of stress and job satisfaction and their potential influence on a premature retirement decision. Finally, teachers were asked their perspective on the professional status and morale of teachers during the course of their careers.

- **What do these teachers think of the changes in the education system during their time in teaching?**
- **Educational change in general**

Retired teachers in both the primary and secondary sectors were, perhaps unsurprisingly, more negative than their working colleagues about changes in education policy. Working teachers saw them in a more positive light, whilst acknowledging the problems they had experienced when changes were first introduced.

The **retired primary** teachers found the speed of change difficult to cope with:

> 'I don't remember there being many changes during my early years in teaching. Recently there have been more than enough to make up for those earlier years. ...the pace of change has been frenetic. All the time we are being asked to change something or another.' (RP1)

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[1] The findings in this chapter link with the discussion of educational and social change in Chapter 3.

> 'Once the changes started to happen, they seemed to come thick and fast and without much co-ordination or planning.' (RP4)

The **retired secondary** teachers were similarly disaffected, not only with the speed of policy changes but also with the direction in which they seemed to be going:

> 'You did really feel as if you were on a treadmill of change, always trying to keep up with the pace of change. You didn't know whether to fully implement one change, then move on to the new or just get on with the next one. It was a bit like being a hamster on a wheel.' (RS8)

For **working teachers**, there had been too many initiatives introduced too quickly, but once they had accommodated the changes, they were generally perceived as positive:

> 'Over all I think most of them are a good idea. There's a lot of paperwork and the job has changed enormously, but it's good that there's more accountability now. There were some teachers who weren't really committed enough in my view and now everyone has to put more into it.' (WS2)
>
> 'Most of the changes have been basically positive. There were a lot of 9 to 4 teachers. There was no accountability and it's good to have more.' (WS8)

- **The National Curriculum**

This section will look firstly at working teachers, then at retired teachers, since responses across the groups were more similar than across the two sectors.

Working teachers, both primary and secondary, gave a mostly positive response to the National Curriculum policy albeit with some negative views on its initial introduction and implementation:

> 'I think most of the recent changes have been ultimately for the better. The National Curriculum, particularly now it's more flexible, is a good thing. There were some teachers who just taught the same things over and over and never changed things for years. So it's made teachers more accountable which is good for good teachers, not so good for others.' (WS3)
>
> 'The introduction of the National Curriculum caused a terrific upheaval. It was difficult and problematic because of the way it was introduced: it was a muddle that had not been properly thought through. But 15 years on it works well. There is greater autonomy again and teachers are able to innovate. And being released from the 'parenting hands' of the local authority is good.' (WP2)

There was widespread negativity about the National Curriculum amongst **retired teachers**, particularly in the primary sector, though some acknowledged that they felt more positive after the initial implementation phase, and also following subsequent revisions:

> 'The National Curriculum was quite horrendous because there was so much to cope with all in one go, and there were so many attainment targets, so much justification.' (RP2)

> 'The National Curriculum was imposed and it took away the spontaneity from teachers. It was supposed to be oh so wonderful, the answer to everything, but it was quickly changed so it can't have been that great. Teachers weren't consulted and that caused great dissatisfaction, even anger.' (RP6)

Retired secondary teachers, whilst acknowledging that the primary sector had been more deeply affected, also regarded the introduction of a National Curriculum as a negative experience:

> 'The National Curriculum had a huge impact, absolutely huge, and I came out for a time, from 1989 to 1991, to become an advisory teacher so I had more than the usual access to special schools and primary schools and I saw the effects of it – it was overwhelming.' (RS4)

> 'I was head of Biology when we had to do the mega changes into the National Curriculum, and you felt as if you were reinventing everything. We really did throw everything out and we brought in new schemes of work in science. I know a lot of schools that just didn't bother...and I always thought that they'd probably got the right idea, but we put so much work into changing it all.' (RS5)

- **SATs and league tables**

A majority of the teachers interviewed were negative towards SATs and opposed to the publication of league tables. There was significantly more negativity towards this policy than towards the National Curriculum. **Working primary** classroom teachers were unenthusiastic:

> 'SATs don't really inform anyone and should be abolished.' (WP4)

> 'The changes went too far and league tables and tests are an absolute nonsense. They don't test the child as a whole and are inappropriate, especially at 7. There's too much difference between seven year olds. It's an enormous pressure and teachers end up teaching to the tests. Plus the government moves the goalposts on tests so that the 'right' number of children pass, so the standards vary from year to year.' (WP7)

However the **primary head teachers** in this group gave a more mixed response:

> 'SATs were a painful process initially but now more autonomy is coming back and staff can use their professional judgement and assess kids on evidence base. I believe it helps push teachers to achieve, and gets kids to a higher level. In trying to achieve the targets, the focus is on the borderline kids and they probably do better as a result of the attention.' (WP2)
>
> 'I think testing children as they enter school is a good thing, but to then test again at 7 is too soon. Children can change a great deal between starting school at say 4, and 7, particularly in schools in deprived areas. I was very anti them when they first came in but I think that, provided you present them to children in a way that is not threatening and in a non test-like situation, then it is just part of the normal testing procedure in the classroom.' (WP3)

Most of the **retired primary** teachers were negative about the SATs and league tables policies:

> 'Then there was the whole issue of SATs which caused a fair amount of mayhem, especially in primary schools I think, because secondary schools already had public exams and primary schools weren't used to that. Also the year that were taking the tests seemed to spend – well, still do I think – seem to spend all year preparing just for the tests. I'm not sure that's a good idea for the children, and it puts a great deal of pressure and stress on the teachers.' (RP1)
>
> 'I taught in the SATs year when they were first introduced, then moved to take the reception class. Everything was geared to SATs and everything else, other projects, had to be put to one side.' (RP6)

Secondary teachers showed a broader and more diverse range of views across the two groups, though several described SATs, as their primary colleagues had done, using words such as 'traumatic', causing a 'huge upheaval' and simply 'not a good thing.' Several were concerned that testing led to labelling some children 'failures', and asked 'the impossible' of teachers in disadvantaged areas:

> 'It doesn't matter what you do, for a child to be told that they have failed at a young age means that when they get to secondary school, they're absolutely convinced that they can't pass anything and they opt out. We used to get eleven year olds who were thrilled to start at their secondary school and we could build on that no matter what level of ability, but now...they're over-examined and they opt out.' (WS1)
>
> 'SATs tests were a nightmare when they first came in and, of course, if you're teaching in an inner city school, where there is a high ratio of children from poor or unsupportive backgrounds, however hard a teacher works to improve results and standards, it will ultimately make little or no difference.' (RS7)

Some teachers whilst being negative about the tests and testing, were even more strongly opposed to the concept of league tables and their publication:

'I think that the publishing of league tables is probably the most significant and negative change that I have encountered. Not only the tables themselves, but even more so the way that parents have been encouraged by the government to judge a school solely by them. Very often, parents simply don't have sufficient information about other factors that affect a school's performance.' (RS3)

Two secondary teachers identified as problematic the Key Stage 2 testing at the juncture between primary and secondary. For example:

> 'Key Stage 2 tests are not externally moderated so it relies a lot on the school itself and how they teach and mark it. Teachers want to do the best for the children and I think there is a tendency to bump up the grades and...what that means is that by the time the children get to secondary school, your expectations will be too high. Also it means, for the teachers in the secondary school, the added value which they should show between that exam and the one at 14 is much harder.' (WS1)

- **OFSTED inspections**

The most negative responses to education policy changes were focussed on the OFSTED inspection regime introduced in the early 1990s. An overwhelming majority across **all groups** found the experience a negative one, though a few head teachers and heads of department, as will be discussed, had devised ways of 'playing the OFSTED game.' The language used to describe the OFSTED experience was often negative in an emotional way, or had negative connotations. Words such as 'soul destroying', 'detrimental', 'gruelling', 'horrendous', 'hellish', 'depressing', 'de-motivating' were used, and several **primary teachers** described them as 'demoralising'. Furthermore, the inspections had caused 'stress', 'tension', 'anxiety', and 'pressure' and were 'a nightmare' for several of the teachers. But why were they such a bad and negative experience? What reasons were given for such responses?

One of the key negative aspects concerned the period of notice given prior to an inspection, and the consequent time spent in preparation and 'build-up' to the actual event which, ultimately, gave a 'false' impression:

> 'The school had pretty good results from the OFSTED inspection but the build up was so pressurised. I think I'd prefer a couple of days' notice so that the school could be

seen as it really is. I wouldn't want to go through another one – it's just a show, all that preparation for what can only be described as a performance.' (RP4)

'OFSTED simply means stress. The whole situation around inspections is false. Schools have advance warning of an inspection and the stress begins at that point. It may be better to have spot checks. As it is everything is planned around OFSTED... It is painfully demoralising to be criticised when you feel you're already doing your best.' (RP6)

'Inspections strike fear in even the most sanguine teacher. It would be better, I think, if they weren't announced quite so far in advance because they do tend to preoccupy the school for months and don't give an entirely honest picture.' (RS8)

Others referred to the inspections as making a judgement from a 'one-off or two-off visit' (WS5) and as providing only 'a snapshot' (WS8) of what is going on in a school. The problems associated with being judged from such a brief visit were highlighted by a significant number of **retired secondary** teachers, in the context of disruptive pupil behaviour during an inspection:

'The most stressful aspect is whether you can maintain discipline because the one thing that's not totally under your control is the class in front of you. You can never predict how kids are going to react.' (RS4)

'Inspections are also an absolute nightmare because teachers are put under the spotlight and it can be very stressful...and if your class plays you up, you're doomed.' (RS7)

'I'm very concerned that groups of children can deliberately decide to misbehave and play up for the inspectors and potentially put a school's inspection in jeopardy.' (RS2)

But for one teacher, the inspection had a happy outcome:

'Just waiting for the door to open seemed like a form of torture to me and the first chap arrived when I had a very difficult class and they played me up, and actually afterwards I was in tears. Then I discovered that I'd been awarded a special rating for being a good teacher because they'd realised that...these kids had seen an inspector coming and thought 'we'll try and put her off'.' (RS5)

Two **retired primary** teachers drew attention to what they perceived as differences between men and women when preparing for inspection, and their responses imply that women teachers are more likely to experience stress during the process:

'As soon as the inspection was announced preparations began. What was interesting was that the men in my school were so much less bothered than the women about

them. They were more prepared to be judged on what happened to be going on when the inspectors came. I don't know whether that's a male/female thing or a kind of arrogance.' (RP3)

'Our school had a good inspection but the whole process is hugely stressful and causes enormous anxiety for many teachers. I think the women come off worst because they worry more than the men. The men in my school just got on with it and didn't seem to make any special effort but the women spent months preparing and putting in lots of extra time.' (RP5)

Given such widespread negativity across all groups about the inspection regime, can OFSTED be considered a factor in early retirement decisions? In Chapter 5, many of the retired teachers, particularly in the primary sector, cited OFSTED inspections as a 'push' factor towards early retirement in the context of their work/life balance. It is interesting to look at **head and assistant head teachers'** experiences of staff leaving because of OFSTED:

'The criteria have got harder and harder each time...and a lot of the teachers are saying "this is just too much, I can't jump through the hoops any more," and are leaving. In schools like mine (a city estate comprehensive) I know it's a key factor as to why some people are leaving, because they're saying "I couldn't possibly cope with this again".' (WS1)

'Have you met anyone who says they're great? I know people who say they would retire rather than face another one.' (WP6)

'I think shorter notice would take a lot of stress away from teachers. Sometimes it's so great that teachers go because they can't face the thought of another one, having been through it all.' (WP3)

However, responses were not all negative. Some **working secondary** teachers felt that inspections could highlight weaknesses that could subsequently be improved:

'They're probably not a bad idea because they can point to improvements that you could make and might not have realised. Also now they don't seem to be quite so overtly and bluntly critical – I think they try to be more positive now. It's still not easy to take criticism – some people can't cope with it.' (WS6)

One newly appointed Head of Technology had used the inspection to highlight, to the school's head, the weaknesses that existed and the lack of much-needed resources. 'Official recognition' of the problem had enabled her to make improvements (WS8). She was not alone in 'playing the OFSTED game' in order to maximise the benefits for her school. Two **primary heads** had also used OFSTED to their school's, and perhaps their own, advantage:

'My first inspection was the second term of my headship and it was quite useful. I knew which changes I needed to make before OFSTED and which I could hold back and then say (to governors) that "OFSTED say we've simply got to do this, that and the other." I knew exactly what I wanted to do so it served my purpose...' (WP6)

'I had a deliberate strategy for the inspections. I took a year out of my headship to train to be an OFSTED inspector so that I knew the 'rules of the game.' It was a deliberate and pro-active strategy and it enabled me to know how the school would be judged so that I could set my own agenda for the inspection... The school development plan was structured along OFSTED lines and my colleagues were taught the name of the game.' (WP2)

This respondent went on to say that she felt that her staff had found the inspection less stressful as a result of her knowledge of the process since they were well prepared and knew exactly what to expect.

- **And have children changed? What about their parents?**

Teacher: ***'Well, there really are all sorts of parents and kids at this school, but I still enjoy teaching here – in a macabre sort of way!' (WS8)***

These questions were asked in order to ascertain whether or not the relationships between teachers, pupils and parents had changed, and the influence that this might have on teachers' thoughts of early retirement: their responses indicated that these relationships had changed significantly. All groups had themes in common, but there were some differences in emphasis between the primary and secondary sectors, so this section will start by looking at primary teachers and their pupils, before moving on to the secondary sector.

One aspect of social change noted by many **primary teachers** was in the structure of families and the influence that had on young children. For example, this primary head teacher told me:

'Parents are often divorced, and then the children expect mums and dads to get married again and they're bridesmaids and pageboys... Then fathers go on and have other children and relationships, and it's very complicated and unsettling for some of the children.

I think, too, that children are counselled more these days. There are support workers and their main job is to do with family events, like Dad has left, or Mum's got a new boyfriend. Sometimes the children don't really know what's wrong, but they're very worried about everything.' (WP3)

The increase in the numbers of mothers working when their children are pre-school age was also noted by some teachers as having an impact on children's behaviour and skill levels when they start school:

'Well I think children are still children at the end of the day. They come from a broad range of families now and their mothers mainly work, and both of these things have to be worked around. In this way junior, and especially infant teachers have taken the place of mother, and doing many things that the mothers used to. Many of the mothers are stressed and trying to juggle too many things and they don't have enough time and patience for their children. I'm not blaming them, it's just the way the world is today.' (RP3)

So what exactly is different, in terms of behaviour and skills, about children starting school nowadays, compared to a generation ago when these teachers began their careers? A significant majority of primary teachers bemoaned the lack of such skills. Here are some examples, in terms of both behaviour and social skills:

'At the risk of sounding like a 'fogey' I think that over the last 15 years there has been a significant deterioration in behaviour and social skills. When kids start school they have poorer behaviour, including swearing, biting, spitting, and poorer social skills including speaking, listening, use of cutlery and going to the loo. Teachers spend time teaching the basics that children starting school used to have aged 4 or 5.' (WP2)

'They find it harder to listen and concentrate. They speak less respectfully to adults. Even very young children refuse to do things.' (WP8)

'Some children take time to settle into class because they've never been told to do anything and have had their own way too easily, for example, over bedtime. Several children in my class, when we were talking about it, said that they go to bed when they feel like it!' (RP1)

Twelve of the sixteen primary teachers interviewed cited 'too much TV' and other such distractions and lifestyle changes as contributing both to children's poor communication skills and tiredness:

'The children that come to us have poor language skills and poor communication skills. They don't seem to be able to listen to stories any more and when you talk to children now about, say, bedtime stories they say 'I have a video', and I think 'what's happened to parents reading books to children?" (WP6)

'I think children are a lot more unfit. They aren't getting enough exercise and they're tired. They go to bed late, watch a video on television in their bedrooms and they're not going to sleep.' (WP3).

One primary head teacher had experienced a parent suggesting that the behaviour of her children was the school's responsibility:

> 'Parents expect teachers and the school to 'sort out' their problem children and their behaviour. I've had parents say 'wait till you get this one, you can knock this one into shape for me', the implication being that the school will be tested in trying to discipline that child, and that it's their responsibility.' (WP2)

Secondary teachers also acknowledged that many of the changes associated with pupil behaviour were reflections of changes in society as a whole:

> 'Children have changed enormously, but I suppose it's really society that's changed not just the children. When I look back to what my teenage years were like, and what I was like as a teenager – and I don't think this is just rose-tinted spectacles – I would never have answered adults back or ignored what they were saying to me.' (WS1)

The problems associated with discipline, sanctions and exclusions were significantly different, and given higher priority, in the secondary sector. Behavioural problems and poor discipline, together with a lack of sanctions, were remarked on by a majority of secondary teachers and were a cause of major concern. The following examples are typical of what they said:

> 'Behaviour is much worse, especially during the last 3 years. It's a reflection of society. There's no doubt about it, children are more difficult to teach. There's less respect and they ignore sanctions.' (WS8)

> 'Children have changed out of all recognition. It's always the few who spoil things for the majority who are fine. There's bad behaviour, bad language, disruptiveness, bad manners, bullying and general anti-social behaviour all round.' (WS5)

> 'Now they answer back and even ridicule punishments. They know, of course, that our hands are tied and we're totally restricted in what we can do. Most of them know their rights, which is quite frightening really.' (RS7)

Another teacher said that there had been a growth in what she called 'immoral behaviour' including stealing and lying (RS2). Associated with the problem of discipline and

sanctions, was the desire of a significant number of secondary teachers to be allowed to exclude persistent offenders:

> 'The discipline is now appalling compared to when I started teaching. I don't quite know when it began to slip but there's no comparison. There are too many disaffected pupils that schools are trying to keep on the rails and in the classroom.' (RS1)
>
> 'I think there are a few kids here who should be excluded and educated separately from their peers because they are beyond anything we can do here in terms of discipline.' (WS2)
>
> 'Once you put all those (disruptive) children together, it's the interaction between them. It's one thing getting them out of the classes where children are keen, but then they all end up in one dreadful class together.' (RS5)

Several teachers directly referred to the problem of drug taking in conjunction with disciplinary problems in their schools:

> 'Some of my class are seriously impeded in their daily lives and their work by dope or whatever. I'm pretty certain that there are a few who smoke on their way to school, and it affects their behaviour.' (WS2)
>
> 'Then there are the problems of drugs and drink. Sometimes in the afternoon I have taught a class where there are a few kids who I'm sure have been drinking or smoking dope or something.' (RS7)
>
> 'Things like dope really affect performance and behaviour. I teach sex education, relationships, drugs and things, and the magazines for young people...the things that are in them!' (WS8)

In common with primary teachers, secondary teachers felt that lifestyle changes had a, sometimes, detrimental impact on children's lives:

> 'Most of them seem to be permanently tired, but they don't seem to eat a healthy diet or get enough exercise or sleep, so it's not surprising really.' (WS5)
>
> 'Many of them suffer from a perpetual state of tiredness. They have TVs in their own room and watch until very late.' (WS7)

Also in common with the primary sector, there were concerns about poor communication, poorer literacy and poor grammar and spelling, which they associated with increased use of computers and tools such as spell checking. However, one teacher remained positive both in terms of the use of computers as well as some of her pupils:

'It's not all bad. I think that their knowledge of computers and access to so many sources of information is an enormous boost and helpful to their studying. Of course some children are disruptive. That's what I like about teaching at A level. The kids have chosen to stay on at school, they've achieved the required GCSE passes to go into the sixth form, and have chosen the subject. It makes so much difference.' (WS6)

And many teachers in all groups acknowledged that, in terms of disruptive behaviour, there were many pupils who are not problematic:

'Most of them are lovely and behave well, work hard and want to please. But in every class there seem to be a few who spoil things for everyone and it's difficult to find solutions because when you talk to their parents, they are often the ones who are aggressive and tend to defend their disruptive child.' (RP1)

Did the teachers think that parents had changed during their teaching careers? Again there were common themes, such as parents not disciplining their children, across the primary and secondary sectors, but there were also significant differences in terms of the level of support for teachers and school. With parents being encouraged to be more involved in their children's education, what were teachers' views on this policy in practice?

Looking firstly at the **primary teachers'** responses, several were positive and pragmatic about the level of parental support that they and their school had experienced:

'I find the parents supportive – I don't see that much difference. I have a few children whose parents say that their children drop off to sleep about eleven and they don't believe in making a child do something they don't want to, but there have always been parents like that.' (WP6)

'Many parents are interested in education – some, not all – but changes in methods and curriculum mean that it's hard to help kids with their work at home. And parents are generally supportive of sanctions. Only the odd one says it's not their child's fault.' (WP6)

However, many primary teachers were critical of unsupportive parents, particularly those who sought to defend their child's poor behaviour or work:

'They seem to be less supportive and more defensive when discussing their child's progress. They seem to be ready with a string of excuses. They can be menacing and aggressive, often about petty things.' (RP6)

> 'Parents are defensive about their children. They don't now back up the school's decisions and sanctions. They're less supportive of the school's ethos and effort.' (WP1)

In terms of involvement in the primary school in an everyday sense, the teachers found many parents to be supportive, but not the parents of children who would benefit from more parental participation:

> 'I don't think parents have changed so much but our relationship with them has. Not so long ago, we never saw parents in the classroom really and just had one parents' meeting each year. Now we have far more contact with them and they come in for assemblies, progress meetings, almost day-to-day discussions in some cases. It's very time consuming but it's probably a good thing.
>
> The only problem...is that it's the parents who are already doing a good job who come in more, and the children who could do with more supportive parents are still not helped enough. They're the ones who don't come to meetings or take any notice of the reports we write on their children.' (RP1)

Several teachers, in particular one of the heads, suggested that aggressive and verbally abusive interactions with parents had become more frequent, whilst another pointed to a growing awareness, amongst parents and pupils, of their 'rights':

> 'As Head, I often have a confrontation by young parents that involves them swearing. There are more foul-mouthed parents. This area is poorer socio-economically than it was 15 years ago when I became head and this is reflected in the parents. They can be aggressive and malicious.' (WP2)

> 'Most parents are OK but they have changed not only in the ways in which they are involved, but also in that some are so aggressive, maybe I mean assertive, of their 'rights.' It can be quite frightening and you can feel threatened. There are some parents – mainly fathers, who can't cope with their child being criticised and only want to hear good news.' (RP3)

But the area where a majority of primary teachers were in agreement, more in nostalgia than in blame, was on the subject of working mothers of young children. Here are a few examples of what they said:

> 'Parenting no longer seems to be instinctive and there has been a loss of parenting skills. But the biggest difference over the years is that mothers work and have no time for things at home like making cakes – nice to eat and to help with making!' (WP7)
>
> 'Governments have encouraged parents to get involved but many mothers are working and have less time than they used to. I feel sorry for some of the children...' (RP4)

'Most of the mothers work and this can make it difficult because some of them are obviously tired and rushed and don't have the time to spend on their children in terms of helping them make the progress that they could.' (RP5)

Secondary teachers, like their primary counterparts, acknowledged that there was a wide range of parents from very supportive to completely unsupportive and many of them thought that the latter group was increasing:

'They are generally less supportive of education I think. Many don't really have time and don't take an interest or make it a priority in their family's life. But they do seem to make time to know what their rights are, even if they don't recognise that they also have responsibilities and obligations.' (WS2)

'They range across the whole spectrum from wonderfully supportive parents to aggressive parents who try to defend the indefensible. Seeing the parents it's so obvious why their children are in trouble or breaking the rules. I suppose there have always been good and, shall we say, 'less good' parents, but there seem to be more bad ones these days.' (WS7)

One teacher suggested that the term 'supportive' had a *double entendre* in the child/parent context:

'There are too many parents who don't support their children. It's funny though because by 'support' I mean encouraging and taking an interest, but some are very 'supportive' when it comes to backing their child's appalling behaviour.' (RS2)

The problem of parents of disruptive or underperforming children not attending meetings with staff was seen as a serious one by many of these secondary teachers, and, like the primary teachers, the fact that the parents who do attend are not the ones a teacher really needs to see:

'Attendance at parents' evenings was unbelievably poor at the last school I worked in. It says something about the parents more than it says about the children or the school itself. They just can't be bothered to come up to school to talk about their kids. They're busy watching television or at the pub. The ones whose kids are behaving and getting on with some good work do come, of course. It's a real problem.' (RS3)

Several teachers felt that parents' evenings should be compulsory:

> 'Especially if you teach in a poor social area, there are too many parents who don't support their children. Maybe if it's compulsory for teachers to write the reports and so on, it should also be compulsory for parents to come to meetings with teachers.' (RS2)

Like their primary colleagues, secondary teachers also felt that parents were at least partly responsible for some of the problems encountered by teachers:

> 'Like father, like son (or daughter) sums it up I think. Every problematic pupil is matched, almost inevitably, with a problematic father – well, it's usually fathers but it can be mothers too! You can see straight away where they get their anti-social problems from.' (WS5)

> 'Generally they seem unwilling or unable to discipline their children, which is a shame. They give in to them so much and then it's difficult to get them to conform to even very basic rules and regulations at school. The children often don't respect themselves or other pupils, let alone staff and parents.' (RS1)

Another teacher suggested that some parents seek to blame anyone rather than taking responsibility themselves:

> 'If a child needs to be disciplined or punished, the parents can be guaranteed to support their child's anti-social or unruly behaviour and try to blame something else for it. It's the school's fault, or it's the teacher's fault, or it's the government's fault – but they're sure it's not their fault or their child's fault.' (RS7)

However, having been critical about some parents, some teachers were sorry about the impact that their lack of support might have on their children's future:

> 'If only they could realise that supporting your children, and supporting their school and its aims can work wonders for the performance of their child, in work and socially. But some of them just don't get it and that's a shame for their children, some of whom are really quite talented.' (WS7)

> 'This situation is most unfortunate for a few of these kids who, with the right encouragement and support from home, could do well, but they won't succeed without that backing.' (RS8)

To conclude this section, one teacher had sympathy for parents, some of whom had a multitude of problems that made managing their children's lives, and being 'good' parents, difficult:

> 'Well, the problem in that kind of school is that there are so many parents who are struggling themselves to actually cope with what life's thrown at them. Parents have got many more opportunities for involvement but I think it must be quite daunting to come up to the school and see a whole load of teachers."(RS4)

- **What about stress? And job satisfaction?**

This section looks at the teachers' experiences of stress and job satisfaction, both separately and in conjunction with one another. Unsurprisingly, all the teachers interviewed said that they had experienced stress at some point during their careers though one commented that stress is 'everywhere' nowadays and had become 'one of the most popular words in the English language' (RS1). Individual responses to stress were varied, as were its perceived causes, which covered many aspects of both their home and working lives. Despite some similar reasons being given by all interviewees, the most frequently cited cause of stress amongst primary teachers was connected to educational policy changes, whereas the most common reason given by secondary teachers was related to social change. Job satisfaction even amongst those teachers who had retired prematurely from the profession had often been high, with peaks and troughs during their careers.

For **primary teachers, both working and retired**, changes in policy that had resulted in a 'massive' increase in paperwork and administrative tasks, together with individual policy changes such as OFSTED inspections, were key factors. Individual responses to stress seemed to be linked to its importance as a 'push' factor from teaching. The **retired primary** teachers were universally stressed at the end of their full-time teaching careers, and all mentioned the administrative aspects of educational change as a key factor, particularly the associated paperwork:

> 'Whole forests must have been felled in the name of all this change. We get so much paperwork sent through to us, and have to fill in masses of forms and paperwork to report on everything that both we and the children do. Administration is now a significant part of the job.' (RP5)

> 'The job has become more difficult and complex and paperwork is a big element of the stress.' (RP7)

Another stressful aspect of administration mentioned by a majority of this group was the growth in the number of meetings they were required to attend for various reasons:

> 'We had meetings about anything and everything. We had staff meetings, parents' meetings – you name it, and I bet we had a meeting about it!' (RP5)

'There's so much paperwork and administration, form-filling and meetings. Meetings about ICT, staff meetings, parents' meetings...' (RP7)

Educational policy, both generally and more specifically, had been a source of stress for many:

'When the National Curriculum came in the stress levels went sky high for everybody and it took a long time to settle. I think teachers who are still working full-time are coping with very high stress levels, especially when it comes up to OFSTED.' (RP2)

'The amount of paperwork associated with the National Curriculum is huge, and when you put that together with inspections and testing and league tables, the stress has risen a great deal in recent years.' (RP1)

The increased involvement of parents and the longer hours required by the job were alluded to by a few of this group as being another element of change which proved stressful in terms of demands on their time outside the classroom:

'Even the reasonable ones (parents) who just want reassurance or whatever still take up time, mostly after school when you still have a million and one things to do before you can go home.' (RP4)

'All of this (extra administration) is stressful and time-consuming and takes away from the chalkface work of the teacher, which is why most of us decided on it as a career. Because of this, the hours we work are longer than they used to be and there's no let up during the weekends or holidays either.' (RP5)

Few teachers outside this group referred to ill heath caused by stress, though half of the retired primary teachers either referred to their own, their friends' or their colleagues' illness:

'Some of my teaching friends have become ill through stress. I decided to leave before it made me ill too. I developed an awful rash on my skin, especially my face and my GP put it down to stress.' (RP6)

'I had to have some time off a few years ago because of ill health connected to stress. The job has become more stressful with all the administration and paperwork...' (RP3)

There was general dissatisfaction about the changes in teachers' work and associated 'stress', with reference to the speed and never-ending flow of changes and the problems of 'implementing someone else's ill-conceived ideas' (RP7).

As discussed in Chapter 6, most of the **retired primary teachers** were undertaking significant amounts of supply teaching in their 'retirement' so they had retained a connection with children and the classroom, and had less responsibility for the more stressful aspects such as administration and meetings. So what was their response when asked about their levels of job satisfaction? Their answers clearly demonstrated their commitment to the actual job of teaching and to the children:

> 'I love it now because I have the involvement with the children and feel as if I am contributing within the school. I have a situation where I'm not involved with parents' evenings and report writing I'm only involved with at a minimal level, just for music.' (RP2)

> 'I enjoyed the job in terms of time with the children right up until I retired. But that part was becoming a smaller proportion of the job and I didn't enjoy the administrative, form filling and report writing. I got little job satisfaction from that aspect of it.' (RP5)

However, for two of the teachers who had suffered health problems connected to stress, their job satisfaction had been adversely affected:

> 'Job satisfaction has been spiralling downwards over the years. I think, well I know, that I've felt it more than some others. The job is tiring and in many ways pretty depressing nowadays.' (RP6)

> 'As stress has gone up, job satisfaction has gone down. The job is wearing and exhausting now.' (RP8)

A majority of the **working primary** teachers had experienced high levels of stress and, like their retired colleagues, policy changes were blamed:

> 'Stress levels are higher. We're always being assessed, and the performance of the children is constantly being assessed and compared with others. There's also loads more paperwork. You could fill a room with files and paperwork.' (WP5)

> 'I always used to work in the evenings, but now it's weekends as well, doing planning and paperwork. And there's no time during the day because with infants there's no non-contact time. There's no slack in the system, and classrooms are supposed to look like John Lewis showrooms!"(WP7)

One of the head teachers in this group regarded technology as a source of stress, both for herself and for her older primary colleagues:

'I think ICT has had a big impact. I think this was a new skill for maybe 90% of primary school teachers and we all had to take on an overload to get these ICT skills, to make ourselves conversant with the software, before we could teach it to the children, and it's a high level of commitment for quite a small result. You don't learn so easily as you get older and you have to put an awful lot of work in to actually feel confident about using the technology.' (WP6)

Whilst acknowledging that they had experienced stress, the head teachers in the working primary group were pragmatic in their response to it. One had been through a period of stress when she became 'more grumpy, and smoked and drank more.' However, she had come through this and was now enjoying the variety of her working day that included 'staff, budgets, unions, cleaning, decorating and curriculum' as well as some infant classroom teaching (WP2). Another head had helped her staff to manage their time in order to minimise their own stress levels and create a good work/life balance:

'I say to my staff that they must be able to switch off at the end of the day and at weekends and have a completely separate life away from school. It's better to stay late and get things done and then not take work home. It's important to switch off.' (WP3)

All of the working primary teachers, apart from one, had high levels of job satisfaction and were enthusiastic about their work in the classroom and with the children. Most of them clearly enjoy their job:

'I still get enormous job satisfaction from working with the children in class, even though it's harder nowadays to manage the classroom situation. When they make progress I feel delighted and glad that I'm doing a rewarding job.' (WP1)

'I think there's always been job satisfaction in teaching but I think that, since they've brought in SATs and testing, we can see children improving termly - and that, I think, is very satisfying. There's a lot more day to day satisfaction.' (WP3)

The factors causing stress for **secondary teachers** were linked more closely with classroom management and poor pupil behaviour than with policy changes such as the National Curriculum and testing. The **working secondary** teachers' individual responses to stress, were mainly positive:

'I'm generally not someone who is easily stressed. I'm just that kind of person. Some people can deal with it better than others. There have certainly been many stressful situations and stressful changes in education and in schools over recent years, but I have not been affected in such an adverse way as some teachers have.' (WS2)

'Stress in teaching is all about how you as a person handle things in your life. I get stressed if I have too much to do and there's a lot more pressure, but if you have good time management and organisation, it's not too bad.' (WS8)

One Assistant Head teacher felt that stress during her career had been 'much of a muchness if you take out the OFSTED inspections' (WS1), and several others blamed poor pupil behaviour for their stress:

'For me the biggest stress is classroom management when you have just one or two disruptive kids who have no interest other than to prevent others from learning, and that can be difficult.' (WS3)

'Stress from disruptive pupils is a different matter altogether (from administration) because there's no easy answer to that apart from removing them from the classroom. But to where?' (WS5)

In terms of job satisfaction, all eight **working secondary** teachers were enthusiastic, again particularly about teaching *per se*, whilst acknowledging that there had been highs and lows, ups and downs:

'I suppose I'm lucky because I really enjoy the job and so I still get job satisfaction even though there have been a few dodgy moments. I can usually see the positives in life, which I think helps, plus I'm the kind of person who relishes a challenge – and challenging it certainly has been.' (WS2)

'Well I have always had job satisfaction even in the bleaker moments. I enjoy teaching – full stop. In some ways the changes have made the job more of a challenge and I like that.' (WS3)

'I still get enormous job satisfaction. I love the job and although it's sometimes a bit much to cope with...how many people can claim to have continuous job satisfaction? Very few I'd imagine.' (WS6)

Only one teacher, the Assistant Head, divided her job satisfaction rating between her administrative role and teaching, but again the teaching was a highly satisfying experience:

'I always loved my job, always, always, until I would say the last five or so years. Now I wake up in the morning and say: 'Why am I doing this?' When I teach...I still get amazing satisfaction. I love it. But the rest is just hassle – trying to get supply staff, dealing with the budget, all that sort of thing.' (WS1)

The key factor in the **retired secondary** teachers' stress was pupil and, in some cases, parental behaviour, though the burden of extra administration, and changes within themselves as individuals, also played a part. These are a few examples of what teachers in this group said about the stress associated with poor pupil behaviour:

'Lack of discipline and also lack of sanctions to deal with it are stressful for teachers because kids today know their rights and know how far you can go. So you always have to be careful to keep within that otherwise their parents will be there on the doorstep of the school within minutes. If only they'd turn up as quickly when notified of a parents' evening!' (RS1)

'Children have changed, parents have changed, teachers have changed...but it goes wider than that. The way people interact with each other, the lack of respect, levels of dishonesty and selfish inconsiderate behaviour.' (RS2)

'The worsening situation in the classroom made each and every class a challenge. You never quite knew what was going to happen. Behaviour can deteriorate rapidly and it can be quite frightening to be challenged by a disruptive pupil. It can happen at any time. It makes the job an exhausting one, particularly as you get a bit older.' (RS8)

Two teachers, in self-reflection, had recognised changes in themselves as contributing to their feelings of stress and a growing sense of inadequacy:

'I increasingly began to feel that I couldn't do the job as well as I had when I was younger. I felt that I was on a downward curve, whereas I'd previously felt on top of things.' (RS2)

'It did become more stressful, but it was partly to do with changes in me as well as changes in the system. It was a two-way thing.' (RS5)

Job satisfaction in this group was generally high, though for some it had deteriorated in the years prior to their retirement. Most of this group had left teaching as a result of school reorganisation and redundancy, and might not otherwise have retired, so perhaps they had not experienced a similar level of demoralisation as some of their counterparts:

'Teaching is a great career and can be so rewarding and fulfilling. If you get a good, well behaved class with little disruption it can be an absolute joy.' (RS1)

'Well in a strange way I've always had a degree of job satisfaction even in the really difficult times. I loved the job from the start and I continued to find it very rewarding and fulfilling right up until I retired.' (RS7)

Three teachers linked their job satisfaction to their A level teaching, specifically because the students had chosen to be there and to take their particular subject, and consequently there was better behaviour in the classroom. For example:

> 'Personally I got great job satisfaction particularly from A level pupils who choose your subject and are perhaps hoping to get to university and need good grades. That can be rewarding and fulfilling.' (RS3)
>
> 'I've had plenty of job satisfaction. I've really enjoyed doing the job, especially teaching A level. I used to come back from our summer holiday and one of the highlights was finding out what the GCSE and A level results were.' (RS5)

However, one retired secondary teacher had experienced 'enormous job satisfaction' and had found teaching 'challenging and rewarding' in the early days of her career, but that had changed

> '...over the years, as the stress increased and the demands made on teaching grew too, job satisfaction went down, well plummeted really, until it got to the point for me where I just couldn't bear going to work each day with no hope of enjoyment or fulfilment – just stress!' (RS8)

- **Do they think that the professional status of teachers has changed?**

Teacher: ***'At one time, to say you were a teacher meant you were a professional. Now if you say you're a teacher you just get sympathy and pity!' (RS5)***

Responses to this question were mixed, and there was no clear pattern either within or between the groups of teachers, though it was generally acknowledged that their professional autonomy had been affected by educational policy changes, particularly the National Curriculum. Here is a selection of responses indicating a perceived loss of status:

> 'Teachers seem to be respected less even though they're nowadays doing a far more difficult job.' (WP1)
>
> 'Teacher assessment and OFSTED question professional status. Everything now needs evidence rather than going on teachers' experience and judgement.' (WP7)
>
> 'I don't feel we're treated by society in general as professionals. We're still regarded as having plenty of holidays and free time.' (WP8)

The media was 'blamed' by many teachers as responsible, at least in part, for what were regarded as attacks on the teaching profession, particularly over the publication of league tables:

> 'I don't think the media have helped recently because when results are published they always decide that, if they've improved, the tests or exams must have got easier and that is so unfair and demoralising for teachers who have worked hard to improve standards.' (RS2)
>
> 'The publishing of results has given them (the media) a wonderful opportunity to criticise teachers who are always blamed. In their book it's nothing to do with the children or parents.' (RS3)

However, there were many teachers who saw professional status not only in a collective sense but also in terms of the respect given to individual teachers:

> 'I think good teachers, almost automatically, are respected and regarded as professionals by most people.' (WS7)
>
> 'Parents generally respect you. You get very few parents who don't respect you. They might not want to know much about it, the ones who just put their children into school and forget about them, but when it comes to parents' evenings and times like that, then the respect is there. If you've got parents who don't respect you, then the children don't respect you.' (RP2)
>
> 'I still feel respected by parents and children, especially as I've got older. I think I'm seen more nowadays as a kind of grandmother figure!' (RP8)

CONCLUSION

This chapter has explored the work-related 'push' factors that play a part in women teachers' premature retirement decisions. The findings show that this decision is likely to be made with reference to a combination of factors associated with change including changes in education policy, in society and in the individual teachers as women, sometimes in association with the process of ageing. As with the lifecourse and retirement findings of the previous two chapters, the four groups of teachers sometimes showed similarity *within* their groups, sometimes *between* groups such as both retired or both primary groups, and at other times the responses were more diverse with less group identification.

Responses to questions about policy changes in education were more similar in the retired groups and the working groups than across the two educational sectors. The retired teachers were more negative about educational change generally and, in particular, about the speed and direction of the change. Primary teachers were especially negative about the National Curriculum and OFSTED, whilst the retired secondary teachers were most negative about the publication of league tables - and OFSTED inspections. The teachers who had coped best with OFSTED were those in management roles who had 'played the OFSTED game' by turning the inspections to their own or their school's advantage. The working teachers had a more positive attitude towards change. Many were negative about the introduction of the National Curriculum but had accepted and adapted to the changes, ultimately regarding them as a positive development. There was opposition to the publication of league tables, particularly amongst secondary teachers.

On the subject of pupils and their parents, the responses of primary teachers were broadly similar *within* the two groups, and there was also similarity *within* secondary teacher groups, though again there were differences *between* primary and secondary. Primary teachers focused on lack of parenting skills in the context of the poor behaviour and skill levels of children starting school. They broadly agreed that children nowadays had few ground rules and little discipline at home, and a significant number of teachers suggested that working mothers of young children spend too little time with them. Secondary teachers were more likely to focus on disruptive behaviour, poor discipline and lack of sanctions, and mentioned other social problems such as drug taking, stealing and lying. All the groups mentioned the increase in television and computer use as adversely affecting children, particularly in terms of tiredness. They were broadly in agreement that the 'wrong' parents attend parents' evenings and that a growing number of parents were not supportive of their children or the school.

As far as stress and job satisfaction were concerned, there was again greater commonality between the primary groups and the secondary groups. Primary teachers blamed much of their stress on policy changes, such as the National Curriculum, SATs, inspections and the enormous administrative burden in terms of paperwork and meetings. However most teachers felt that they had experienced high levels of job satisfaction, though the retired primary teachers slightly less so. They had also been highly stressed, even ill, at the time

of their retirement. Secondary teachers were more likely to blame their stress on aspects of social change, such as classroom management and disciplinary problems though several working secondary teachers had devised effective strategies of stress management. Job satisfaction had been high in the retired group, who had mostly left teaching because of school reorganisation, and amongst working teachers who gained particular satisfaction and fulfilment from the actual job of teaching *per se*.

There was no particular group pattern to responses on the subject of professional status and morale, except that there was a widespread view that both were at a lower point than they had been earlier in their careers. Many teachers alluded to media attacks on the profession, particularly in the context of the publication of results and league tables, suggesting that if exam results were higher, the media response was that the exams are easier, and if the results are lower, then it was the fault of teachers. However some teachers thought that the situation was now improving and some felt that there had always been respect for good, individual teachers.

The following chapter brings together the three themes of this research in terms of the literature reviewed and the findings and suggests that they are linked to the factors influencing women teachers' early retirement by the three concepts of choice, challenge and change.

CHAPTER 8

THE FACTORS THAT INFLUENCE THE CAREER EXIT AND EARLY RETIREMENT OF WOMEN TEACHERS

INTRODUCTION

- A summary of the salient findings of this research
- The early retirement 'plait': Choice, challenge and change
- Choice and the work – life – early retirement balance
- Challenging times in work and early retirement
- Three aspects of change: Educational, social and individual

CONCLUSION

INTRODUCTION

To retire, or not to retire: that is the question. Decisions about early retirement made by women teachers are, as has been shown in the findings of this research, both complex and complicated. It is a crucial, life-changing decision ultimately made after much deliberation and soul-searching, broadly channelled along the three lines of enquiry of this research.

Firstly, the research sought to discover in what ways women teachers' life-course experience of balancing work and family commitments influenced their retirement planning. What might be considered the potential 'pull' factors of each individual teacher's personal life, their husbands or partners and family members, and the ways in which these act to tip the balance towards the 'life' part of the work/life balance?

Secondly, perceptions of, and preparedness for, early retirement play a part in the decision-making process, particularly in the realm of financial resources. What reasons do teachers give for retiring early and what are they doing in their 'retirement'? And why do many women teachers not retire early?

Thirdly, there is the 'work' side of the work/life balance. Do work-related factors 'push' women teachers from the teaching profession into early retirement? Or is there, for some, a 'pull' factor towards continuing in a profession that offers them job satisfaction and challenge?

In this final chapter, I propose to look at each of these three areas in turn, drawing attention to the salient findings of this research. I will then explore three analytical themes - choice, challenge and change – which the research findings suggest to be key inter-related factors influencing women teachers' early retirement decisions.

- **A summary of the salient findings of this research**

In terms of the 'life' side of the work/life balance, an overwhelming majority of the teachers interviewed had married during their twenties and were still married to the same man. An overwhelming majority also had children, so the interview data were largely obtained from married mothers, now in their fifties. The teachers who were mothers had taken career breaks that varied from a few months to ten years, with a maximum of fifteen when part-time return was taken into account. They had changed jobs either because of a geographical move in connection with their husband's work, as the result of moving to a better residential location in the city, or for their own career advancement. Apart from the three head teachers, most primary teachers did not seem to regard their job as a 'career' whereas the secondary teachers, most of whom had been to university and subsequently trained as teachers, appeared to regard teaching as a career and expressed greater career orientation.

As individuals, virtually all the retired primary teachers expressed negative attitudes towards the concept of change in both their personal and professional lives, whilst non-retired secondary teachers were overwhelmingly positive about change. And in terms of

their family orientation, primary teachers more frequently alluded to family life as a seemingly powerful 'pull' factor away from work, both in terms of their husbands or partners, their children, their own parents and grandchildren. Several retired primary teachers were undertaking a caring role for their parents and others were involved in voluntary or community work. Whilst there was no particular pattern in terms of the retirement status of husbands, it was, nevertheless, expressed as a factor of considerable importance in the retirement decision in one way or another.

In terms of perceptions of, and preparedness for retirement, the difference in career orientation between the primary and secondary teachers seemed to connect with their 'work' in 'retirement'. Most of the primary teachers were supply teaching, one for as much as four days each week, and combining this with family activities and hobbies, whilst the secondary teachers had all embarked on what might be regarded as a new 'career', with only two retaining a connection with education. Again, husbands were central to the retirement decision in terms of financial preparedness. Most of the married teachers, not only those who had retired, suggested that their own 'career' was secondary to that of their husband, and that they were planning their retirement in conjunction with one another. All the retired teachers felt they were financially prepared for early retirement though, in the event, most were still involved in paid employment and had not exited the labour market. In contrast, a significant number of those still working regarded themselves as unable to afford to retire early as well as being unsure as to how they would spend their time if they did so.

Turning now to the third line of enquiry, the teachers' working lives, education policy changes were unpopular, in various ways and to varying degrees, with every teacher interviewed. Amongst primary teachers, the policy topping the unpopularity stakes was the National Curriculum and its associated administrative burden though, amongst retired primary teachers, inspections were frequently mentioned as a factor that had influenced their early retirement decision. Secondary teachers tended to be more critical of the publication of league tables and competition between schools than of inspections. However, the secondary teachers were still more negative and, seemingly, more deeply affected than their primary counterparts by social change, particularly in terms of poor pupil behaviour and unsupportive parents. Several of them also mentioned change in themselves as individuals as a factor in the retirement decision-making process.

- **The early retirement 'plait': Choice, challenge and change**

In analysing my findings, and exploring the three concepts of choice, change and challenge, I see a plait of three strands that are not only intertwined together, but also with the three themes of this research – women and the work/life balance, early retirement and education policy and women teachers.

- In Chapter 1, **choice** and constraint in terms of women's work/life balance were explored and Chapter 5 detailed the related findings from questions about the teachers' individual life course.
- Chapter 2 looked at both past and present perceptions of early retirement, and the way in which it is now regarded as representing a time of new **challenge** particularly for people who are financially secure: Chapter 6 summarised the interview data from questions on this theme.
- In Chapter 3, the gendered impact of educational **change** was explored together with associated aspects of social change, and the findings on this theme were given in Chapter 7.

- **Choice and the work – life – early retirement balance**

Choice: 'a range of options from which to choose, a possibility due to a favourable combination of circumstances'[1]

The women teachers interviewed for this research have made decisions and choices throughout their working lives, in order to achieve a satisfactory work/life balance. Their age means that they have tended, if married, to have a traditional marriage in which they accepted responsibility for the majority of childcare and domestic duties, taking career breaks of varying lengths in order to fulfil that role. Even though they themselves had a professional career, many of them nevertheless accepted that their husband's career took priority over theirs, hence they moved and changed their jobs, both around the country and

[1] The definitions of choice, challenge and change, used in the section headings of this chapter, are taken from the Oxford English Dictionary

within the Study City, for that reason. This would seem to suggest that their 'choices' were mostly made in the context of priority being given to relationships and family life and this may be linked to their age and the socialisation of girls and women in family and work orientation (Pollert: 1981; Crompton & Harris:1999). In some cases their career suffered as a result, thus acting as a form of 'constraint' on their own working life. However, taken together with other findings from this research, there are other significant factors to which these teachers have given consideration both during their careers and in early retirement decisions.

In terms of there potentially being 'a range of options' available to women teachers in their fifties, they might, in theory at least, choose either to continue in full-time work, reduce their working hours through part-time or supply teaching, or leave teaching altogether. Financial considerations would seem to be, literally, the 'bottom line' in this decision process. In most cases, not only did the teachers interviewed have an occupational pension of their own, but also their husbands are, or will be, in receipt of an occupational pension, so the majority of interviewees were relatively financially secure. The findings from this research suggest that financial security is a key factor in the decision-making process that enables a genuine choice to be made about early retirement. Where early retirement is a choice, it is closely connected with adequate financial provision (Gilleard & Higgs:2000; Hirsch:2003).

If choice is 'a possibility due to a favourable combination of circumstances', one favourable circumstance is obviously the availability of financial resources. The findings of this research indicate that many of the non-retired teachers interviewed felt that they were unable to afford to retire before 60. There was something of a recurring theme that they would retire if they 'won the lottery' or 'came into some money' indicating that, in more favourable financial circumstances, they would give serious consideration to leaving teaching. Whilst a majority of those still working said that they enjoyed teaching and still gained a high level of job satisfaction from it, it is not possible from this research to conclude whether or not they would actually leave their job if they could afford to do so. There was, though, a widespread perception amongst retired teachers that the main reason for their older working colleagues not retiring was, indeed, their financial position.

In relation to finances and the early retirement choice in this research, an important factor was the redundancy package. As a result of an extensive, ongoing school reorganisation

programme, the retired secondary teachers had been given a choice between a voluntary retirement scheme and moving to another school: all had taken up the redundancy package offered to them. Their description of this as, for example, a 'gift' and 'irresistible' revealed the way in which it had, for them, presented a welcome exit from full-time teaching. Most had used the lump sum part of their package to pay off their mortgage, and only one of the retired teachers still had a mortgage, described by her as 'minimal.' All except one of them also had savings, unlike their working counterparts, most of whom had few or none. None of those offered a retirement package had declined it. So financial security, in the context of the early retirement decision, could be seen as a combination of planned resources - such as savings, regular mortgage repayments and pensions – and unplanned resources such as redundancy packages and, rather less likely, 'winning the lottery.'

But is financial security the only aspect of choice in the early retirement decision? None of the teachers interviewed in this research had been forced to retire through, for example, ill health, so everyone had, to a large extent, *chosen* to retire. But what other 'choice' factors played a part? From the interviews, and particularly in connection with education policy changes, it would seem that the work/life 'balance' for many of these teachers had become unbalanced and that the choices around early retirement represented an opportunity to restore and regain a more satisfactory equilibrium. The response of one teacher summed this up succinctly in a way that was echoed by many others. When asked why she had retired, her response was: 'because I wanted my life back!'

Policy changes, particularly those creating an increased administrative burden for teachers, have seemingly resulted in 'work' encroaching into 'life' with more evening, weekend and school holiday 'work'. This appeared to be more of an issue for the primary teachers who, on retiring, have chosen to supply teach, with the expressed aim of avoiding or ameliorating the effects of the elements of policy change that they disliked and found so stressful. Several 'retired' primary teachers had returned as supply teachers to the school in which they had previously worked. By supply teaching they were, in effect, choosing *not* to spend time on bureaucracy, choosing instead to work as much or as little as they wanted to, when they wanted to, and with the majority of their time spent in school concentrated on teaching itself. This also provided a valuable source of income given the relatively high rates of pay for supply teaching. In terms of the life course and work/life

balance, many teachers had also opted for supply teaching earlier in their careers when they were caring for their pre-school children.

As already discussed, the teachers had tended to give high priority to families in their work/life balance and the findings here suggested that retirement choices were also made through negotiating an early retirement life plan with their husbands and other family members. For some teachers, four generations of family relationships were given consideration. There were elements of choice in their wanting to be available to give more care to ageing parents, to spend more time with their husband if he was also retired, as well as with their own 'children', now mostly in their twenties and thirties. Spending time with grandchildren was also mentioned by several primary teachers as a positive choice in terms of time allocation in retirement, as were gardening, decorating and other hobbies and interests connected with their homes. This focus on home and family is linked with Sandra Acker's work on the role of the primary teacher as an extension of motherhood and where the culture of the primary school is in some respects akin to an extension of the family (Acker 1995, 1999). The findings from this research suggest that many of the primary teachers had a greater 'caring' than 'career' orientation.

In respect of relationships with husbands and partners and their retirement, no particular pattern was demonstrated by the findings. Some teachers had retired, whilst their husbands had not, and in several instances it was suggested that his continuing in work had, in financial terms, made it possible for her to retire. In other cases, working teachers were married to retired husbands, one of whom apparently happily referred to himself as a 'kept man'! There were also couples who had retired at the same time specifically so that they could pursue joint interests and spend time together, and couples who were both still working. This suggests that, whatever the combination of work and retirement between them, decisions had been jointly made and planned both in financial terms and in terms of other life choices and priorities.

Returning to the work/life balance and the ways in which the women teachers interviewed had sought an effective and satisfactory combination of employment and family life, and decisions around leaving employment for early retirement and family, I would argue that

Catherine Hakim's 'preference theory' is relevant to this research.[2] Central to her theory are the concepts of 'choice' and 'diversity.' Whilst some groups of women clearly have fewer genuine choices than others, the women teachers in this research have had the opportunity of making certain choices about their work-lifestyle preferences and, despite all working in the same profession, have shown considerable diversity in those preferences. Some teachers clearly had prioritised being at home with their small children. One felt that it was a 'shame' that fewer mothers nowadays can and do make this particular 'choice.' Another teacher felt 'torn between home and work' when she returned, and one said that she 'hated being at home' and wanted to go back to work as quickly as possible. Since these responses came from different groups of teachers, it is not possible to conclude here that primary teachers are more inclined to prioritise their families, and secondary teachers their careers though, as already discussed, primary teachers do appear to have a high level of orientation towards the caring role.

Within teaching, the women had diverse employment profiles in terms of phases of full- and part-time working and career breaks, as well as in promotion and career orientation. There were single women and those without children who had been self-supporting, working continuously and prioritising their work, but the majority, who were mothers, had sought a balance between employment and family life. Furthermore, the combination and balance between the two was not static but something that evolved in response to other life course factors. Two of the three heterogeneous categories in Hakim's 'preference theory' – 'work-centred' and 'adaptive' – are groups in which the teachers would seem to have found themselves at different career and family stages.[3] Prior to motherhood, most teachers were work-centred from the time they qualified until they had children. Those who did not become mothers have remained in this group with higher career orientation. After motherhood, I would suggest that most of the teachers became part of an 'adaptive' group characterised by diversity and including women who seek to *combine* work and family, with neither being given obvious priority, and who have obtained qualifications with the intention of working (Hakim 2000:158). Furthermore, most of the teachers considered their career to be secondary to that of their husband.

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[2] See Chapter 1, Part 1 – 'Choice: Individualist explanations and 'preference theory'

[3] See Appendix 1. It should be noted that Hakim's three work-lifestyle preferences are presented as ideal-types, and the diversity of the largest 'adaptive' group is more flexible and unstable than the two more consistent smaller groups at either 'extreme.'

Whilst some of the teachers said that they were still working because they could not afford to retire and, therefore, did not have a realistic choice, others had made a positive choice to stay working until 60. This was for a variety of reasons including a planned retirement with their husband or partner at a later stage, the 'pull' factor of good job security, pension and job satisfaction. However, they also mentioned more negative aspects about staying in the profession including the problems associated with changing jobs after 50 and not knowing what they would do as an alternative, either in work or retirement.

A further element of 'potential' choice in retirement and early retirement is one that at present does not exist in terms of the teaching profession and teachers' pensions, but which was, nevertheless, asked as a hypothetical question in the interviews. The teachers, both working and early retired, were asked for their views on partial or flexible retirement from the teaching profession as a potential option where teachers might receive part of their pension and remain in part-time teaching at the same time. Would such a scheme act as an incentive to teachers to continue working thereby potentially helping to alleviate the problem of retention of older teachers?

There is a growing focus on the idea of flexible retirement, and the transition from full-time work to full-time retirement (Fogarty:1975; Laczko & Phillipson:1991; Walker:2002; Platman:2004; Phillipson:2004; Pensions Commission Reports:2004:2005). Of the sixteen working teachers interviewed, only two gave negative responses and the remainder ranged from being cautiously interested to very enthusiastic.[4] One Assistant Head said that she thought it would ultimately be 'essential' given the difficulties in recruitment that she believed would become 'a massive problem' for inner city schools, like hers, within the next five years. She suggested that 'failing' or unpopular schools were not only being shunned by parents but also by teachers.[5] Amongst retired teachers, the response was more varied and, arguably, less relevant, with some secondary teachers who had moved on to a new career feeling that it would have made no difference to them personally, though in principle they thought it a good idea. For retired primary teachers, most thought it a good idea, and suggested that they had formulated their own brand of flexible retirement in opting for a

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[4] For example: 'I think that's a *brilliant* idea. It's a pity you can't do it. If there was an option of getting some pay and some pension I think it would be great.' (WP6)

[5] She gave the example of a nearby, but not city centre, Beacon School where her husband is head receiving around 30 applicants for an advertised post, whereas her inner city school might get 'only two.' (WS1)

reduced pension whilst continuing with supply teaching. Several teachers mentioned that they would have welcomed the opportunity to job share.

So, in certain favourable circumstances, choice is a key factor in women teachers' retirement decisions. In this research, the teachers who had retired early had a level of financial security that enabled them to make other lifestyle choices in the context of leaving their full-time teaching post before 60. This was either as a result of long-term financial planning or because of the offer of a retirement redundancy package. Most of the primary teachers were in the former category and had continued to supply teach in 'retirement' whilst all of the secondary teachers were in the latter category and had all found fulfilment in a change of career.

- **Challenging times in work and early retirement**

Challenge: 'a demanding task or situation presenting a test of one's abilities'

During the first half of the twentieth century, retirement at 65 was characterised by loss of faculties, poor health, inactivity and receipt of a state pension. With the advent of early retirement, a division developed between those 'retiring' in reality as long-term unemployed and receiving only state benefits, and those retiring in their fifties with an occupational pension. Over the past fifty years, and particularly in recent decades, the growing trend towards early retirement has made the retirement process less stereotyped and more individualistic, and the retired characterised by heterogeneity and diversity (Gilleard & Higgs:2000; Thane:2000). Individual retirees now have widely differing financial resources, health and attitudes: some are 'old' at 50, others are 'young' at 80. For many, it is now regarded as a time for opportunity and reinvention rather than rest and relaxation, particularly during the so-called 'Third Age' (Laslett:1989:1996).

None of the teachers interviewed for this research had left the profession as a result of ill health, though many teachers do indeed leave for that reason.[6] In the same way that

[6] In 2004-05, a provisional estimate of 930 women teachers retired on the grounds of ill health. The number reached a peak of 3,310 in 1994-05 and, apart from a small increase in 2000-01, has been falling ever since (see Teacher Retirements at www.dfes.gov.uk/rsgateway/DB/VOL/v000633/index.shtml) .

some individuals find change problematic, there is wide diversity in the ways in which individuals perceive and tackle a challenging situation both at work and in their personal life. This section explores teachers' individual attitudes towards the challenges of teaching and early retirement, and whether or not attitudinal factors and personality differences influenced either their decision to stay in teaching, or to leave.

The findings from this research suggest that challenge *per se* may be welcomed less by primary classroom teachers than by those in the secondary sector. Again, the attitudes of the primary head teachers were significantly different from those who had remained at the chalkface in that they had a positive attitude towards both change and challenge.[7] The primary teachers interviewed appeared to have a more negative attitude towards a new challenge. Looking firstly at those who had retired, they generally seemed eager to escape from the classroom, given other favourable circumstances, and regarded neither remaining in teaching, nor their retirement lifestyle as a positive challenge. Most of them had been considering early retirement for several years and had no regrets about leaving the profession. In retirement, everyone in this group was combining supply teaching with hobbies and spending time with their families, none of which constituted a new challenge in terms of the definition used here. As mentioned earlier, some returned as supply teachers to the school they had left, thus embedding themselves in familiar territory, with people already known to them. Supply teaching appeared to be more popular in the primary sector than in the secondary, and offered a *less* challenging mode of continuing in teaching than a full-time contract. A majority of those still working said they would consider supply teaching in their 'retirement'. Whilst some retired primary teachers had undertaken new voluntary work or hobbies, such as making tea for prison visitors and learning a new language, in the main their hobbies and interests were home and family oriented. As such, they represented neither significant change nor challenge, merely the availability of more time to pursue them.

The primary teachers who were still working seemed to be doing so not because they relished the challenge of their working environment or the role of teaching but because they felt that they had no choice but to do so. All of those who were not head teachers said they would retire if a suitable package was offered, and two of the three heads would

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[7] For example: 'I like change and new things – it's challenging!' (WP2); 'For me, because I like challenges...it hasn't been too stressfull.' (WP6)

prefer to work part-time, though being head meant that this was an unlikely option. This meant that only one working primary teacher would continue through choice, and she admitted that being a head was a crucial factor given that her work was varied enough to include time in her office, time with colleagues and only occasionally involved working in the classroom. However, the higher occupational status of the heads did appear to indicate that their work was a more important part of their lives and offered them a greater sense of life control and higher career orientation. And it should be acknowledged that these teachers had earlier taken up the challenge of going for, and achieving promotion to, headship.

Having explored the primary teachers' attitudes towards challenge, the rest of this section looks at the challenges faced by secondary teachers in two contrasting ways: the challenges of *remaining in* secondary teaching and of *'retirement' from* teaching. The findings here suggest that the secondary teachers interviewed had a positive approach towards challenge in both their working and personal lives.

Asked if there were circumstances in which they would consider early retirement, only one of the working secondary teachers expressed serious enthusiasm for it, saying that she was 'counting the days' until she could leave.[8] The remainder of this group were reluctant to retire early, suggesting that they experienced a 'pull' factor towards teaching, finding the career itself to be a challenge.[9] They were experiencing high levels of job satisfaction and successful adaptation to the more stressful aspects of the job. There was an element of not having given consideration to a working life outside teaching, in wanting to 'keep busy' and having 'no intention of retiring.' But their responses suggested that the challenge of teaching was still rewarding and fulfilling, with alternatives likely to offer less financial and job security. Job satisfaction was a key factor for this group. Several respondents were opposed to the idea of supply teaching in 'retirement' because they believed that they would not get the same job satisfaction they valued so highly in their full-time post, particularly in developing relationships with the pupils.[10]

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[8] Fortunately for this teacher she has, since the interview, been offered a retirement package and is now self-employed, setting up computerised timetabling systems for local secondary schools.

[9] For example: 'I like being busy and active and I also like a challenge. I don't know whether retirement would provide that.' (WS3); 'I enjoy the job and find it challenging, though often very stressful, but I don't know what I'd do with myself if I didn't keep working.' (WS6)

[10] For example: 'On the negative side (of supply teaching) you don't know or get to know the kids you're teaching.' (WS8)

Physical factors and personal circumstances related to the ageing process and ill-health were alluded to by several respondents as potentially affecting their attitude towards retirement, and forcing them to give up the challenge of teaching. One teacher said that on some days she felt physically less able to deal with the pace and hectic environment of the classroom and school and thought it was 'just an age thing' (WS2). Another teacher was experiencing a significant deterioration in her hearing, which was causing problems in the classroom. But generally the attitude of this group was summed up by one teacher who said: 'We never know what's round the corner but, barring accidents or illness in my family, I have every intention of carrying on' (WS7).

The group who had embraced change and challenge to the greatest degree was the retired secondary teachers. As already discussed, these teachers had been the beneficiaries of retirement packages that had given them relatively good financial security. But the findings suggest that, in any circumstances, these women would enjoy a new challenge and would not be happy or fulfilled by a greater focus on hobbies such as home decorating. They had all forged new careers in a variety of different areas of employment and business[11] and, for some, the opportunity for a change of career had acted as a 'pull' factor from teaching, and influenced their retirement decision.

A change to a new and different career represents a challenge for anyone at any age, but given the combined factors of age and gender (Ginn & Arber:1996), this was an even greater challenge for this group of secondary teachers for several reasons. They had entered teaching in their early twenties and had no experience of any other type of work during the intervening three decades. Although teaching itself has been changing during their careers, there must inevitably be a degree of well-established familiarity in the school system and teaching role and a corresponding lack of knowledge of any alternative career.

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[11] Of the retired secondary teachers interviewed, two have gone into business with friends (internet and boutique), two are involved with environmental issues (one running recycling consortium education courses and another organising a campaign group), one works for a building society, one for an estate agent, one is an office manager and only one sets up and organises courses at a college of further education. Since the interviews took place, one teacher has taken early retirement and is self-employed and working on timetabling programmes.

Challenge, as defined here, for these retiring teachers, implied not only using their pre-existing skills and abilities, but also the need to develop a new and different skills for a new type of work. On leaving teaching, several of these women had embarked on IT courses in order to develop what they regarded as essential skills if they were to compete effectively with others in the job market. One of them mentioned the need for up-to-date computer skills when '*up against younger people going for the same jobs*' (RS2), whilst others mentioned the need for 'completely different skills' from teaching. Learning new skills, and developing existing ones, is a significant and serious challenge for many people in their fifties, but it was taken up in different ways by all of the retired secondary teachers in this research.

The existence of a challenge, either in work or in early retirement and a change to a different career, is an important factor for those who, as individuals, need to be tested by new goals and aspirations. For some of the teachers interviewed, challenge and change were unwelcome, and they made decisions that enabled them to opt, instead, for continuity in their lives. In the primary sector, this was demonstrated by the retired group who had all chosen supply teaching as a way of remaining in a relative 'comfort zone' rather than embarking on something completely different. In the secondary sector, the findings suggested that those still teaching enjoyed the challenge of continuing to work in a career that afforded them a high level of job satisfaction, despite the frequent dissatisfaction and frustrations associated with it. Those who had, in effect, been offered an exit from teaching had entered a new and challenging phase of early retirement life with the financial and personal resources needed to make it an opportunity and a challenge.

- **Three aspects of change: Educational, social and individual**

Change: 'to make or become different, to move from one system or situation to another'

Change, in every area of work and personal life, has been an important and significant factor during the workspan of the teachers interviewed for this research. There have been far-reaching policy changes throughout the course of their careers, but the speed and never-ending nature of educational change during the 1990s and beyond has had a deep

impact on the teaching profession. In parallel with policy change, society has also changed in ways that have affected teachers and schools, particularly in terms of respect for teachers and for authority more generally. In addition to these two aspects of change, the teachers have also been influenced, in their decisions about retirement, by their own personal attitudes to change, and changes in themselves as individuals from the start of their teaching career to their fifties. This section will look firstly at change in terms of education policy; secondly, at social change particularly in terms of parents and pupils, and thirdly, at personal and individual perspectives on, and aspects of, change.

Firstly, in terms of educational change, the exploration of policies in Chapter 3 demonstrated the extent and speed of change, particularly after 1988 (Phillips & Furlong:2001; Coffey:2001; Whitty:2002; Tomlinson:2001:2005). The work and role of the teacher has indeed 'become different' as in the above definition of change. The key changes occurred at a time when the teachers interviewed were aged around their mid to late forties. The findings of this research strongly suggest that the impact of these changes has been important in terms of early retirement decisions, particularly for primary teachers for whom it seems to have been one of the most significant factors. It is not, though, simply a matter of the actual policy, but also of the associated outcomes such as an increased burden of documentation and administration. One respondent thought that '*whole forests must have been felled in the name of all this change. We get so much paperwork... Administration is now a significant part of the job' (RP5).* Criticism of change was about both the policy changes themselves and the speed of their introduction. One teacher referred to teaching having 'changed beyond recognition' whilst another referred the changes as coming 'thick and fast and without much co-ordination or planning.'

In responding to questions about educational policy change, the retired primary teachers interviewed for this research focused on two policies in particular that had influenced their personal perspectives on teaching and had made them think about leaving the profession. The introduction of the National Curriculum had an enormous impact on primary teachers and although broadly supported in principle, its implementation had proved problematic in terms of work overload and over-prescriptive subject content. OFSTED inspections were almost universally disliked and regarded as a 'push' factor from teaching, though one of the most criticised aspects, the length of notice of inspection, has been addressed since the

teachers retired.[12] Given that all the retired primary teachers interviewed were supply teaching, it would seem that it was not teaching *per se* that they sought to escape, but the aspects of the job now associated with a full-time contract such as paperwork, meetings and inspections.

For secondary teachers, in addition to general criticism of the recently reformed inspection regime, the most unpopular policy was the publication of league tables, but there has been no indication of plans to change this particular policy. Since the retired secondary teachers in this research had all left as a result of policies at local level, it is not possible to conclude whether or not educational policy at national level played a significant part in their decisions. They were all, at the time of the interview, engaged in a new career challenge, although some of them missed teaching and were, in some ways, sad to have left the profession. However, their responses would suggest that central as well as local government policies were a contributing factor, particularly in terms of discipline and sanctions.

Social change, in terms of this research, is relevant for teachers in two ways. Firstly, there have been changes during their careers in policies regarding discipline and potential sanctions for disruptive or rule-breaking behaviour. There is a connection here with the role of parents and whether or not they support disciplinary procedures and the general behavioural ethos of the school that their children attend. Secondly, changes in society more widely, and particularly in family structure and disciplinary frameworks, impact upon the teachers within a school. The findings of this research suggest that, whereas policies related to behaviour and discipline may indeed act as 'push' factors towards retirement, the impact of societal change more generally appears to engender a lower level of dissatisfaction and frustration, not to a degree likely to be a significant influencing factor.

Both government and school policies play a part in the ways in which disciplinary procedures operate in schools. There have been swings in government policy regarding exclusion and sanctions for ill-disciplined behaviour, whilst schools themselves have their own individual disciplinary procedures and sanctions. Teachers in this research

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[12] *The Future of Inspections* (OFSTED, 10 February 2004) reviewed school inspections in response to ongoing criticism by schools and teaching unions. It recommended reducing the time between inspections, the length of notice given and making the inspections themselves of shorter duration.

complained of a lack of sanctions for disciplining disruptive pupils, particularly at secondary level, and would welcome change in this area. But whilst some wanted to remove such pupils from their classes in order to effectively teach the well-behaved majority, they saw even greater problems in having all the unruly pupils in one class together, or in educating them separately. So classroom management was, for many secondary teachers, an important issue though the problem was not always about serious indiscipline, but about continuous low level disruption such as sending texts to each other and 'backchat'. It was universally agreed that discipline had deteriorated significantly since they began teaching.

The lack of support of parents for school discipline and general behavioural ethos was also an issue of concern. Many secondary teachers believed that parents were nowadays less supportive of sanctions in response to their children's bad behaviour. This was reflected in teachers' views more generally about behaviour throughout the school years - and before. Primary teachers complained that some children had no disciplinary framework on starting school and appeared to be allowed to behave as they pleased, even refusing to do things and answering back to teachers from a young age. One primary head teacher put it rather depressingly:

> 'At the risk of sounding like a 'fogey' I think that over the last 15 years there has been a significant deterioration in behaviour and social skills. When kids start school they have poorer behaviour, including swearing, biting, spitting, and poorer social skills including speaking, listening, use of cutlery and going to the loo. Teachers spend time teaching basics that children starting school used to have aged 4 or 5' (WP2)

I have quoted this again because it sums up, so succinctly, what most primary teachers said about change in terms of young children's social skills, and the effect that this had on their teaching task, particularly in reception classes. Some even wished to 'turn back the clock' to a time when fewer mothers of pre-school children worked, and were able to spend more time with their children.

At secondary level, change outside the school environment was focused on the problems of teaching pupils who were permanently tired, and occasionally influenced by drugs. These were both regarded as areas where a reverse was unlikely because so many

teenagers now have televisions in their own bedrooms[13] and drug taking, particularly smoking cannabis, is widespread.[14] The findings also suggested that some parents expected the school to sort out disciplinary problems and that their children's behaviour was the responsibility of the school or teachers.

Thirdly, individual perspectives on and adaptation to change had influenced teachers in terms of their either continuing to work or becoming disillusioned and deciding to retire. Whilst some teachers had become stressed and demoralised by educational and social change, others had, after a period of readjustment, embraced the positive aspects of the changes and adapted to them. Educational policy change had, as a potential 'push' factor, been experienced by all the teachers, but their differential capacity for adaptation to change meant that whilst for some, it had acted as a catalyst to premature retirement, for others it had operated as a 'pull' factor to remain in teaching.

Amongst classroom teachers, responses to questions about their attitude to change in a general sense, indicated that teachers who were still working possessed a more sanguine approach to change. In some cases, they had been prepared and able to take criticism from the inspections and try to improve their classroom practices. Some of them considered teaching a vocation and were still motivated by their work and job satisfaction despite the pervasive effects of policy change. It was also suggested that the scope of the new inspection regime had 'weeded out' poor teachers who were unable to adapt to the new working environment, and acknowledged by some that change was both necessary and inevitable. However, as discussed above, the 'retired' secondary teachers had gone on to embrace significant change in terms of their new careers.

There was, however, universal dislike of change amongst the retired primary teachers interviewed, who had seemingly been unable to adapt to changes in the role and work of teaching so, for them, educational policy changes had contributed to their early retirement decision in conjunction with aspects of 'choice' already discussed. They appeared to dislike change in their personal lives and favoured a stable working and personal

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[13] This was not only the case with teenagers. Two of the primary teachers said that 'many' of the children in their class had a television in their bedroom and that they went to sleep when they were too tired to continue watching.

[14] Five out of sixteen secondary teachers interviewed mentioned 'dope' as affecting some pupils' performance and behaviour

environment. But the change they were making in opting for early retirement, whilst constituting a lifestyle change, represented a move away from the more stressful elements of school teaching towards a greater involvement with family and a more flexible teaching role in keeping with their work choices. Although they were apparently unenthusiastic about change in general, they understandably welcomed change in this context.

It is interesting to note that there was a significantly different and more positive attitude among the three primary head teachers, all of whom had been promoted in the early 1990s. In respect of the National Curriculum, they had spent little time actually teaching in the classroom since its introduction, so had less direct personal experience of the day-to-day problems of its actual delivery. With regard to inspections, two of them specifically mentioned using them to their advantage in order to persuade their governors to agree to expenditure in certain areas. One of them had trained as an OFSTED inspector during a sabbatical year, and used her knowledge of 'the rules of the game' to her own, and her school's advantage. Their responses strongly suggested that promotion to head had given them greater personal fulfilment and motivation to continue working than seemed to be the case with their contemporary classroom teachers. They appeared to regard their work as an education-oriented career, whereas their counterparts were undertaking vocation-oriented work.

In terms of changes in their personal lives, several events were mentioned as potential early retirement catalysts including the retirement of a husband or partner, caring requirements of parents and the arrival of a grandchild. Changes in personal lives also included financial aspects such as 'coming into some money' and maturing of financial policies. But another key factor was that of individual change in terms of ageing and coping with a new and more difficult working environment. The ageing factor also connects with responses to stress and feeling unable to cope as well as previously was a factor for some of the retired teachers. One retired secondary teacher mentioned the problem she had, in her early fifties, of remembering approximately thirty names of pupils in each of six or seven classes that she might take each day!

So educational, social and individual change are all potential factors in the 'change' strand of the early retirement plait. Whether or not they are a catalyst towards early retirement is dependent on individual perceptions of and attitudinal responses to change. The findings

of this research suggest that this is not only in terms of structural and behavioural change – of policies and personnel - but also as a consequence of personal experiences of stress, job satisfaction and factors associated with the ageing process. Some individuals have a broadly negative attitude towards change, whilst others are more positive regarding it as a challenge.

CONCLUSION

The decision of women teachers to exit a lifelong career in their fifties, either to retire or for an alternative working life, is a significant and life-changing one, a complex interaction of 'push' factors from teaching and 'pull' factors towards a life after teaching. Leaving work is an important event that can affect the leisure and family life of individuals, their level of income, social interaction with colleagues, self-esteem and mental and physical health and wellbeing.

This thesis has argued that not only are *women* defined by heterogeneity but also that *retirement*, particularly early retirement, is characterised by wide diversity, and this is demonstrated by the retirement decisions of the women teachers interviewed for this research. Whilst there are areas of commonality in the factors influencing their decisions, there are significantly more differences between them and, perhaps even more so, between the choices and decisions of working and retired groups.

A factor that all the retired teachers had in common was that of being in a financial position to enable them to *choose* to retire. Conversely, most of those teachers who were still working felt that they were *not* in a position to make that choice. Where the decision is made in the context of choice, the process had usually begin with a favourable attitude towards retirement or exit from the profession, and was influenced by employment and retirement policies, as well as factors related to life outside the workplace. For the secondary teachers in this research, such policies in relation to local educational reorganisation were an important factor in enabling such a choice to be made. For the primary teachers, the retirement choice was possible, in financial terms, through negotiation and lifelong planning with their husbands. But retirement decisions were made, not only in the context of choice, but also in conjunction with change and challenge.

Changes in education policies, and consequently in the working lives of teachers, were a vital 'push' factor, particularly for primary teachers. Secondary teachers were more averse to social change in the school context, in terms of poor discipline and low level disruption, and a lack of penalties and sanctions with which to tackle them. The findings suggest that both of these were powerfully influenced by individual teachers' perspectives on and adaptation to change, so that structural change was, or was not, an exit factor depending on each individual teacher's response to it. The 'change' factor is a complex phenomenon because those teachers who had adapted less well to structural change had, nevertheless, opted for a significant change by leaving their lifelong career for an alternative kind of work and lifestyle. This change was less marked in the so-called 'retirement' of primary teachers, most of whom had embarked on supply teaching for two or three days a week. For the retired secondary teachers the change was an important one given that they all exited the profession for a new and different career. The teachers who were still working full-time had also experienced the policy changes, but had been able to adapt to them in a more positive way. They also demonstrated a preference for continuity over change, described variously as a case of 'if it ain't broke, don't fix it' and 'better the devil you know.'

Challenge is intertwined with the retirement choice, and structural and individual change, in that the secondary teachers were choosing to take up a new challenge, in the context of changes in education policies at both national and local level. A dislike of challenge was a factor in the primary teachers' decision to embark on supply teaching, though some had, albeit fleetingly, considered alternative kinds of work. Teachers who were still working tended to regard educational change as a challenge *per se*, and appeared not to have experienced such a radical deterioration in job satisfaction in the light of such challenging change.

Ultimately the teachers interviewed for this research were striving to achieve a satisfactory and fulfilling work/life balance which, particularly for women, concerns making choices and deciding priorities regarding the division of commitment between career and family. This balancing act is an evolutionary process, particularly in the context of marriage and motherhood, which spans the working lifecourse. The teachers were, with few exceptions, in traditional, long-term marriages, and had accepted responsibility for childcare in the early years taking career breaks, often followed by part-time or supply work before returning full-time. They had subsequently given higher priority to work in the context of

the growing independence of their offspring, but had reached a mid-life phase in which disaffection with the 'work' side of the balance was leading to a re-evaluation of priorities.

Whilst the decision to retire can, for these women teachers, be seen as a plait comprising choice, challenge and change, it would be less easy to identify one strand as paramount in that decision. Different strands of the plait are, given the diversity of their individual personalities, attitudes and situations, more important for one woman than for another. The pre-existence of a realistic and genuine choice was, however, a constant factor as was a desire to improve the work/life balance from a position in which 'work' had begun to impinge to an unacceptable degree on 'life.' This rebalancing took the form, for the secondary teachers, of a different career that gave renewed inspiration to the work element of their lives, thereby restoring an agreeable and rewarding equilibrium. For the primary teachers, it is questionable whether or not 'balance' is an appropriate term, given that it implies equivalence between work and non-work activities. These women were, in fact, happy to choose to tip the scales in favour of increasing time and energy spent with their family and according less importance to paid work.

This thesis has explored the factors that influence women teachers' retirement decisions and has concluded that the decision is a complex mixture of structural, economic, social and attitudinal factors. But could government policies and initiatives potentially stem the flow of women teachers from the education system?

In terms of retirement and pension policies, the findings here suggest that a significant number of the teachers would welcome an initiative that enabled them to retire 'flexibly', either through part-time working and part-pension, or the availability of more opportunities for job-sharing. Flexible retirement, together with policies designed to encourage later retirement, is currently on the political agenda but this would require the co-operation of many agencies, including school managers with responsibility for any financial implications. It is also debatable whether such a policy would have the desired effect of retaining teachers in the profession since it could, potentially, have the opposite effect of enabling those who would otherwise continue full-time to opt for a reduced commitment. However, such an extension of choice would create more flexibility in the retirement process.

In terms of education policy, findings suggested that the key concerns of the primary sector were the administrative burden associated with the curriculum and testing, and the inspection regime. Recent legislation has attempted to address both of these issues, though it would is too early to assess their impact, particularly as there are ongoing debates as to the acceptability and role of classroom assistants. In the secondary sector, key 'push' factors also included discipline and sanctions, and the publication of league tables. Discipline and low-level disruptive behaviour have been acknowledged by government, teaching unions, teachers and many parents to be a major area of concern, but the cessation of the publication of league tables is not on the current policy agenda.

Paradoxically, whilst policy changes may, in theory, have the potential to ameliorate the 'push' factors that influence early retirement decisions, an education policy respite might make a more significant and powerful contribution to a reduction in the rate of early exit from the profession: a 'less is more' strategy. Overload of policy initiatives has been shown to be a key factor in teachers' retirement decisions, and this research has demonstrated that teachers, both working and retired, typically cite being on 'a treadmill of change' as a fundamental problem in their day-to-day working lives. Not only is policy change *per se* a factor, but also the continuous and never-ending nature of those changes.

Chapter 8

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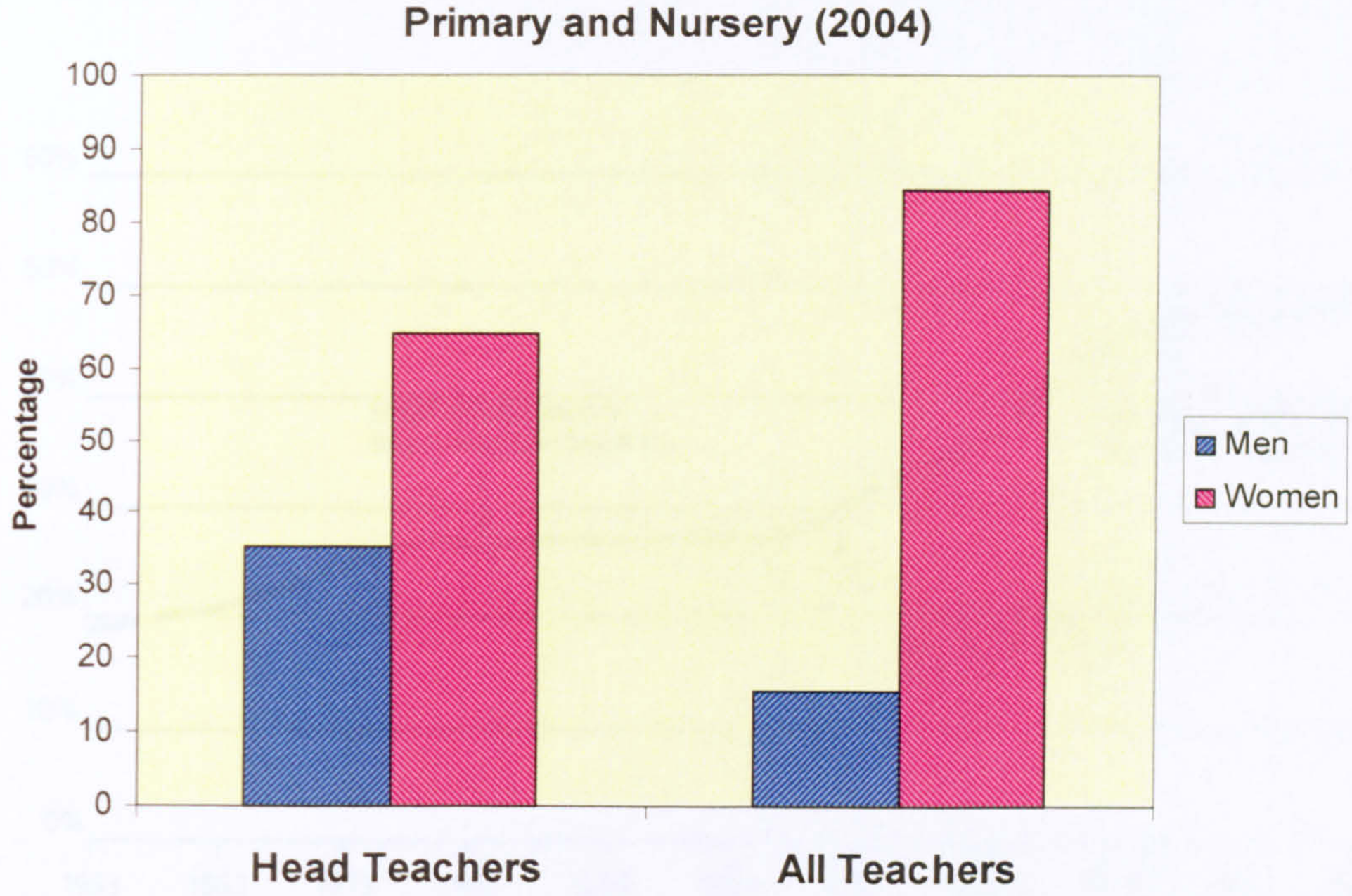
APPENDIX 1

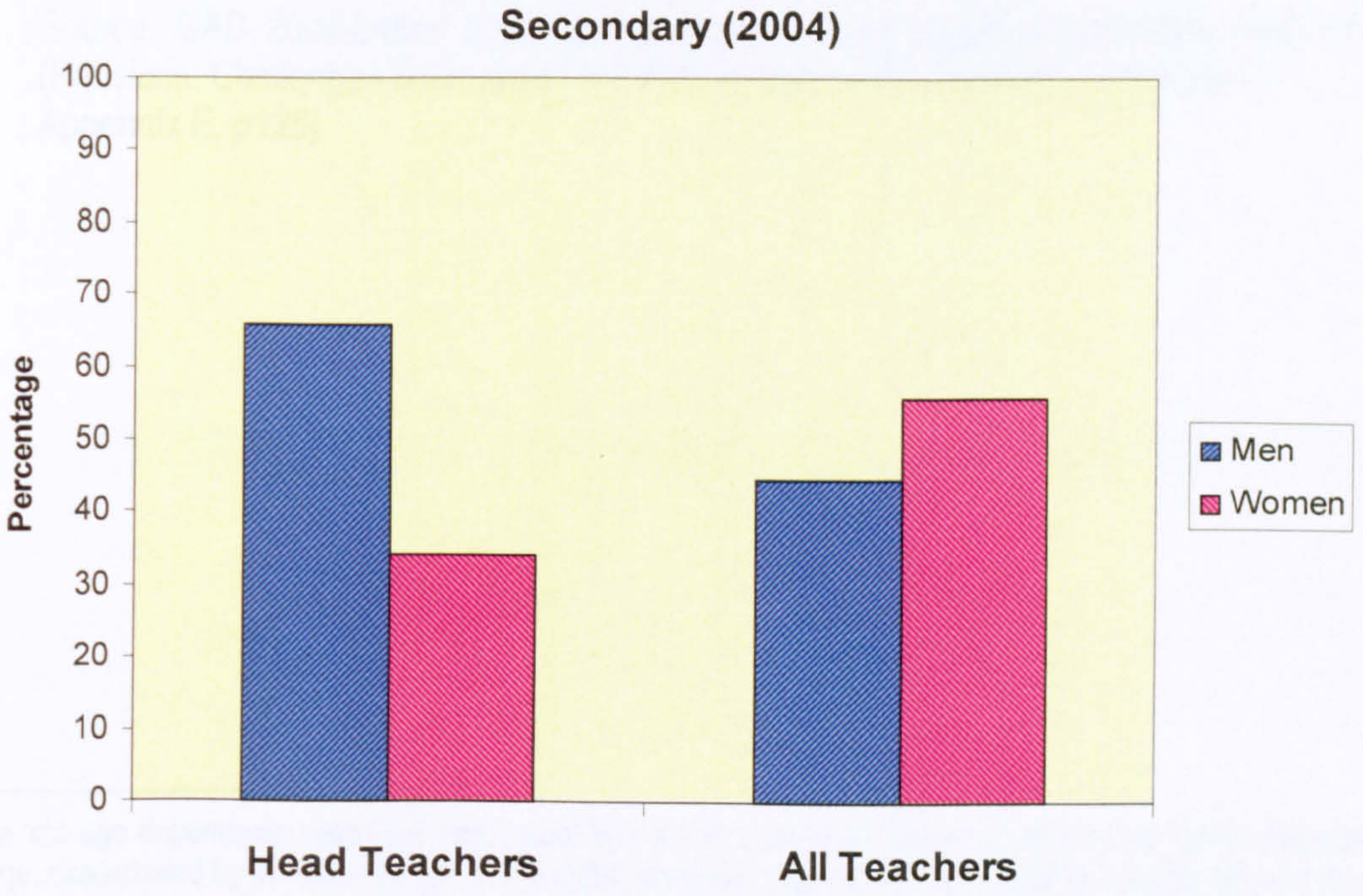
A CLASSIFICATION OF WOMEN'S WORK-LIFESTYLE PREFERENCES IN THE 21ST CENTURY

Home-centred	Adaptive	Work-centred
20% of women varies 10%-30%	60% of women varies 40%-80%	20% of women varies 10%-30%
Family life and children are the main priorities throughout life	This group is most diverse and includes women who want to combine work and family, plus drifters and unplanned careers	Childless women are concentrated here. Main priority in life is employment or equivalent activities in the public arena: politics, sport, art, etc
Prefer *not* to work	Want to work, but *not* totally committed to work career	Committed to work or equivalent activities
Qualifications obtained for intellectual dowry	Qualifications obtained with the intention of working	Large investment in qualifications/training for employment or other activities
Responsive to social and family policy	*Very responsive* to all policies	Responsive to employment policies

Source: Hakim:2000:6

APPENDIX 2
FULL-TIME QUALIFIED TEACHERS AND HEAD TEACHERS IN SERVICE IN THE MAINTAINED SCHOOLS SECTOR BY GRADE AND SEX (ENGLAND)

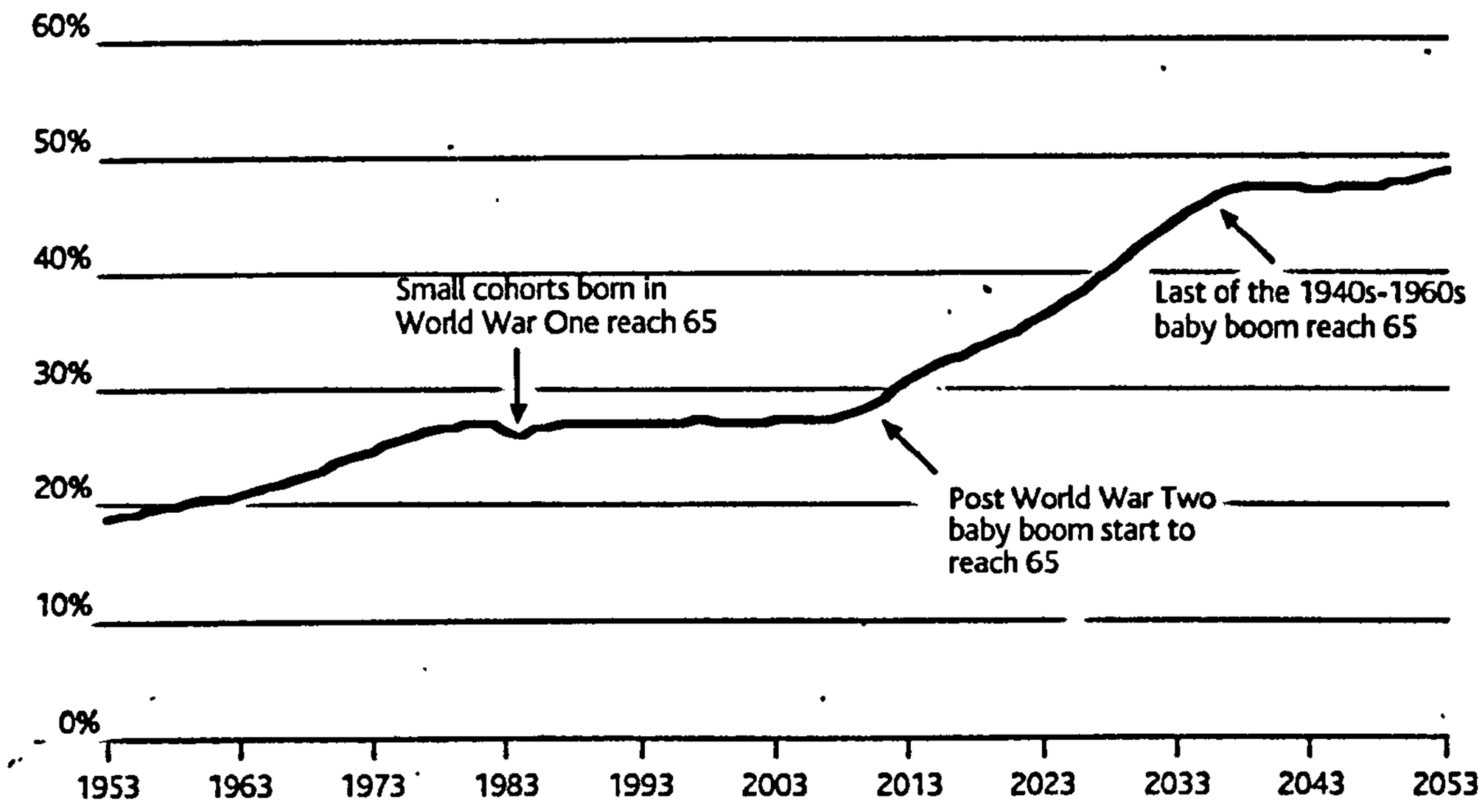




Source: Database of Teacher Records (www.dfes.gov.uk)

APPENDIX 3

EVOLUTION OF THE OLD-AGE DEPENDENCY RATIO[1] 1953-2053, GB



Source: GAD 2002-based population projection, GB Population Estimates Unit, ONS (Pensions: Challenges & Choices, The First Report of the Pensions Commission, Appendix E, p125)

[1] The 'old age dependency ratio' has been used by the Pensions Commission to emphasise the demographic change, exacerbated by the 'baby boom', in the balance between people who are currently working age and those who are over retirement age. It should be noted that the 'dependency ratio' makes no allowance for the number of people below retirement age who are not working and may therefore be 'dependent', or for those over retirement age who are working, or have other forms of income, and may therefore not be dependent.

Appendix 3

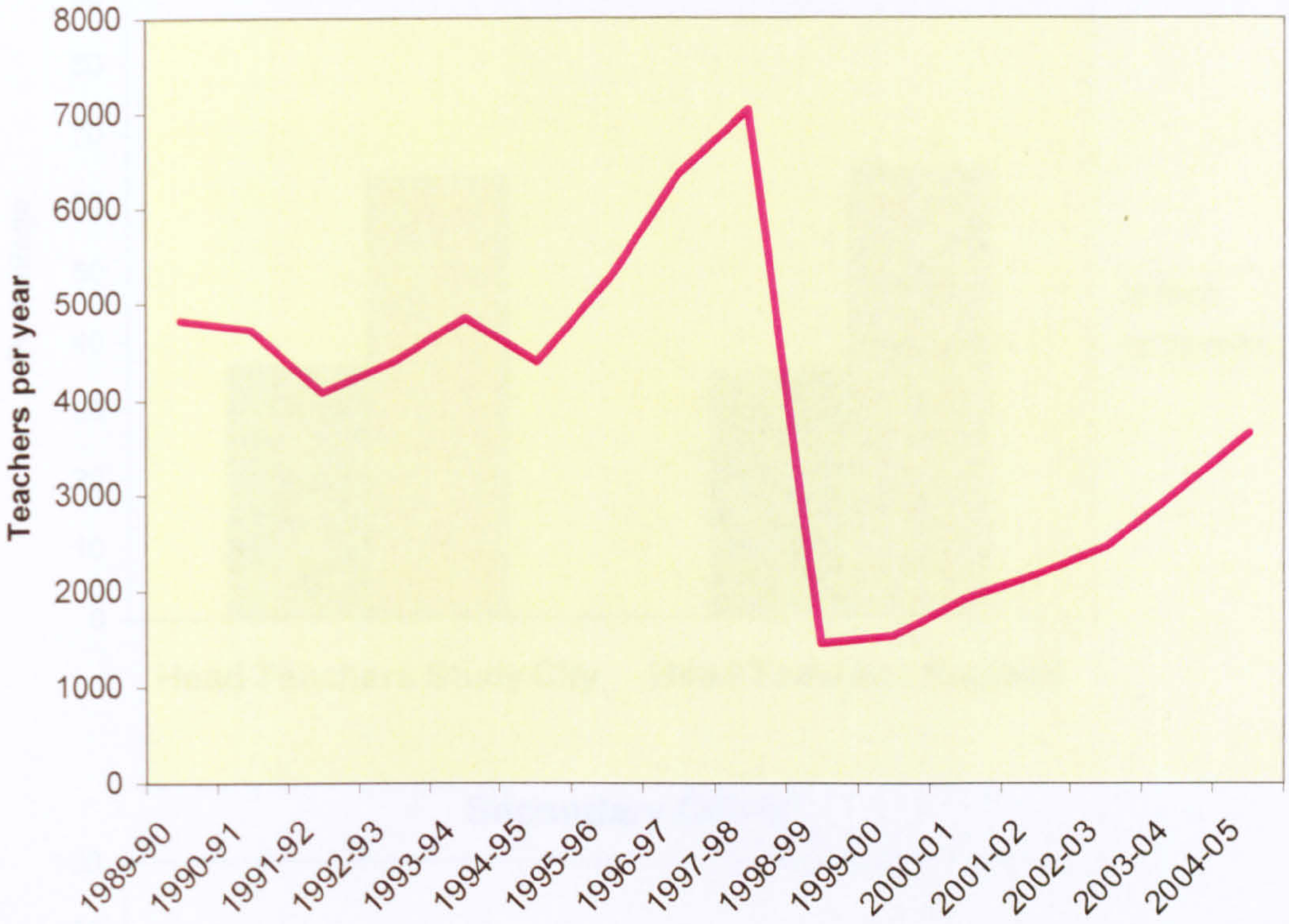
APPENDIX 4
RESEARCH SAMPLE LIFE COURSE DATA

ANALYSIS CODE	ENTRY ROUTE	MARITAL STATUS	NUMBER OF CHILDREN	CAREER BREAK (YEARS)		ATTITUDE TO CHANGE	
				FULL-TIME	PART-TIME RETURN	PERSONAL	WORK
PRIMARY TEACHERS							
WORKING							
WP1	TTC	M	2	5		+	+/-
WP2	TTC	M	2	7		+	+
WP3	TTC	M	2	3	2	+	+
WP4	U	M	1	0		+	+
WP5	TTC	M	2	0		+	+
WP6	TTC	M	3	2	10	+	+
WP7	TTC	M	2	2	13	+	+/-
WP8	?	M	2	9		+	+/-
RETIRED							
RP1	TTC	M	2	6	2	-	-
RP2	TTC	M/D/M	1	0		+	+/-
RP3	?	M	2	5		-	-
RP4	TTC	M	3	7	2	-	-
RP5	TTC	M	2	7		-	-
RP6	TTC	M	2	7	1	-	-
RP7	TTC	M	3	7	2	-	-
RP8	TTC	M	3	10		-	-
SECONDARY TEACHERS							
WORKING							
WS1	TTC	M/D/M	0	0		+	+/-
WS2	U	M	2	7		+	+
WS3	U	M/S	0	0		+	+
WS4	U	M	3	9	3	+	+
WS5	U	M	2	3	3	+	+
WS6	U	M	1	2		+	+
WS7	U	M	2	9		+	+
WS8	TTC	M/D	1	0	5	+	+
RETIRED							
RS1	U	M	2	6		+	+/-
RS2	U	M	2	3		-	-
RS3	U	M/W	1	1	1	+	-
RS4	B.Ed	M	1	5		+	-
RS5	U	M	2	5		-	-
RS6	TTC	S	0	0		+	+/-
RS7	U	M	2	6		-	+/-
RS8	U	M	3	10		-	+/-

KEY: TTC = Teacher Training College; U = University (+ PGCE); BEd = Bachelor of Education (at TTC); M = Married; D = Divorced; W = Widowed; S = Single; + = positive; +/- = mixture of positive and negative; - = negative

APPENDIX 5

WOMEN TEACHERS: PREMATURE RETIREMENTS FROM THE MAINTAINED SCHOOL SECTOR IN ENGLAND[1]



Source: Database of Teacher Records and Pensioners Statistical System (PENSTATS) (www.dfes.gov.uk).

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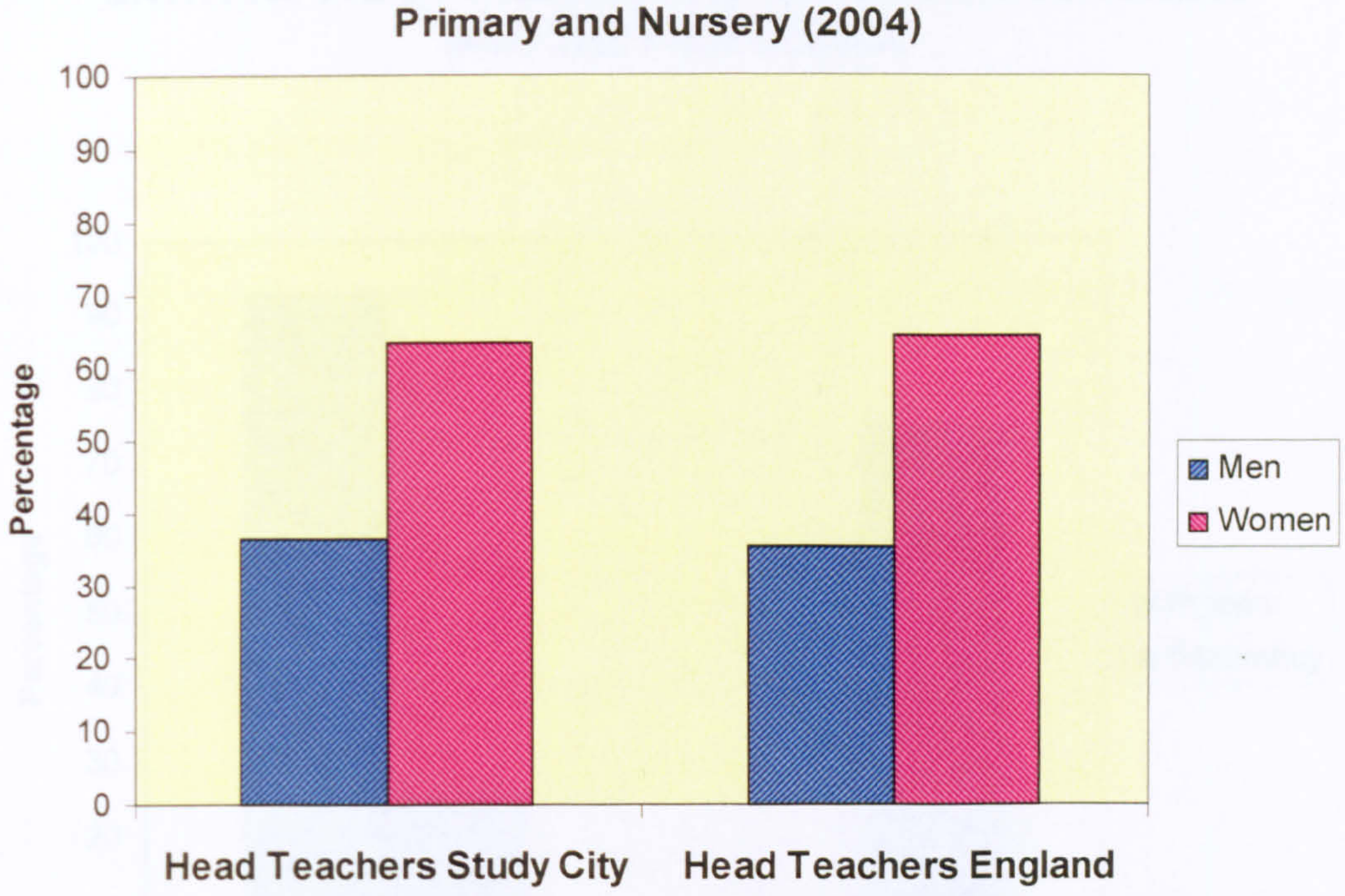
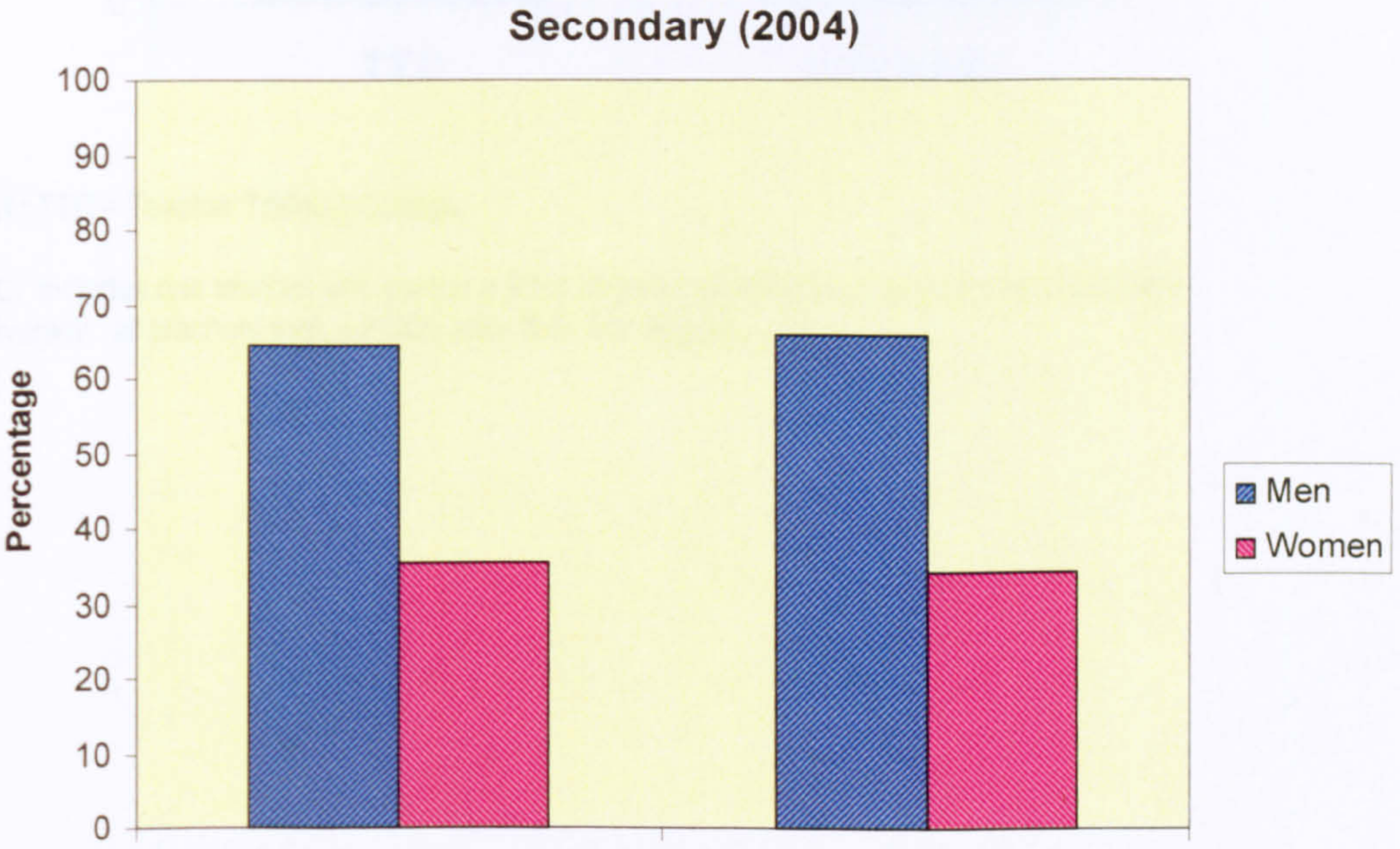
[1] Changes in the statutory regulations governing ill-health retirement came into force on 1 April 1997. To qualify for ill-health retirement benefits after that date, a teacher must be regarded as permanently unfit to teach.

Appendix 5

APPENDIX 6
HEAD TEACHERS IN THE MAINTAINED SCHOOLS SECTOR IN ENGLAND AND THE STUDY CITY BY GENDER



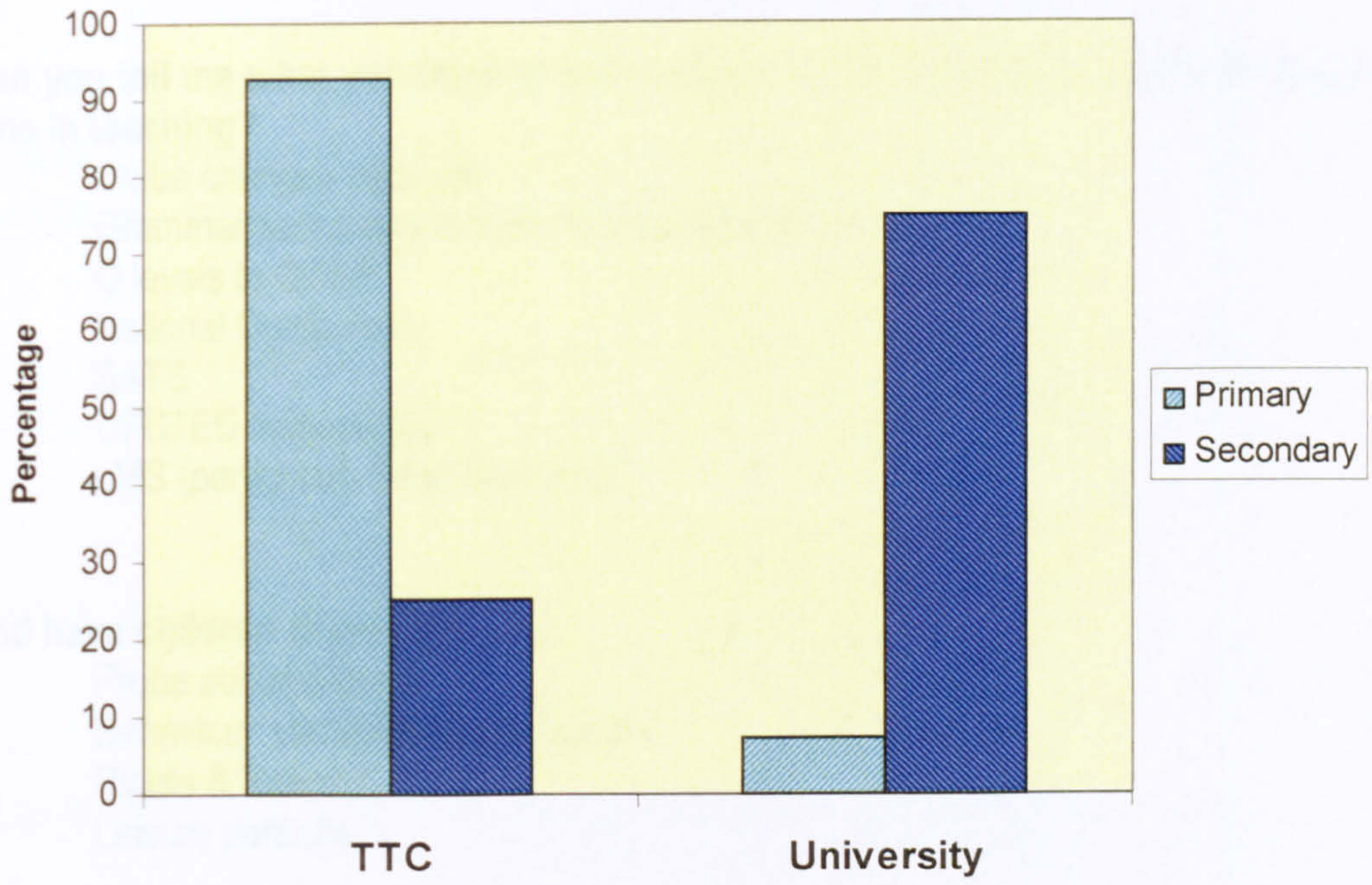


Source: Database of Teacher Records (www.dfes.gov.uk) and www.(study city)-lea.org.uk/schools

Appendix 6

APPENDIX 7
RESEARCH SAMPLE: LIFE COURSE DATA

ENTRY ROUTE OF PRIMARY AND SECONDARY TEACHERS INTO THE PROFESSION



KEY: TTC = Teacher Training College.

TTC: includes one teacher who gained a B.Ed degree but attended a teacher training college
University: all teachers took a PGCE after their first degree

Appendix 7

APPENDIX 8
INTERVIEW QUESTIONS – WORKING TEACHERS

EDUCATIONAL CHANGE & TEACHING

Why did you choose teaching as a career?

Do you think teaching is a convenient career for a woman?

Can you tell me what you think of the changes in the education system during your time in teaching?

Probe changes such as:
Grammar/secondary modern to comprehensive
O levels to GCSE
National Curriculum
SATS
OFSTED inspections
LMS (particularly head teachers)

And have children changed?

Probe social change:
Behaviour, discipline and sanctions
Rights & Respect
Leisure pursuits

What about their parents?

Probe social change:
Respect for school and teachers
Parental support – positive and 'negative' aspects

Do you think that the professional status of teachers has changed?

Probe:
Media
Politicians
Parents and pupils

What about stress?

And job satisfaction?

Is training and professional development easily available and accessible?

EARLY RETIREMENT

Are there any circumstances in which you would consider early retirement?

Have you at any time considered a change of career?

If partial or flexible retirement were available, would you be tempted to go down that route?

Supply teaching
Views on idea of part work/part pension

Why do you think some women teachers retire early? What factors might influence them?

Do you think there is age discrimination in the teaching profession?

Promotion
Training and professional development
'Hiring and firing'

Do you think it could be a reason why some teachers retire early?

Do you as an individual, not taking into account your husband/partner, feel that you will be financially secure in your retirement?

Do you have savings in addition to your occupational and state pensions?

Do you have financial commitments, such as loans or a mortgage?

Would you say that your husband/partner's financial position has in any way affected your decision to continue teaching?

Are there any circumstances in which you would take early retirement?

LIFE COURSE & PERSONAL LIFE

What is your marital status?

Have you been the main breadwinner at any stage of your working life?

Do you have children or stepchildren?

With regard to balancing work and family life, could you give me an idea, perhaps chronologically, of periods when you worked full-time or part-time?

Have you had any career breaks?

Did they affect your teaching career?

What was your experience of returning after a career break?

Can you tell me about any moves you have made, either geographical or to a different job, and why?

How would you describe the effect, if any, of these moves on your career?

Would you say that you generally find it difficult or quite easy to adapt to change?

If you were starting your career now, would you choose teaching again?

APPENDIX 9

INTERVIEW QUESTIONS - RETIRED TEACHERS

EDUCATIONAL CHANGE & TEACHING

Why did you choose teaching as a career?

Do you think teaching is a convenient career for a woman?

Can you tell me what you think of the changes in the education system during your time in teaching?

Probe changes such as:
Grammar/secondary modern to comprehensive
O levels to GCSE
National Curriculum
SATS
OFSTED inspections
LMS (particularly head teachers)

And the children you taught? Have they changed over the years?

Probe social change:
Behaviour and discipline
Rights and Respect
Leisure pursuits

What about their parents?

Probe social change:
Discipline
Respect for teachers
Support of children

Do you think that the professional status of teachers has changed?

Probe:
Parents and pupils
Media
Politicians – local and national

What about stress?

And job satisfaction?

Was training and professional development easily available and accessible?

EARLY RETIREMENT

Why did you retire from teaching?

Do you have any regrets about leaving?

If partial or flexible retirement had been available, would you have been tempted to do that?

When did you first consider early retirement?

Now that you've left full-time teaching, how do you spend your time?

Paid employment
Voluntary roles
Family and caring roles
Leisure

Can you think of anything that would have persuaded you to stay teaching full-time?

Do you think that there is age discrimination in the teaching profession?

Why do you think some of your colleagues continue to work until retirement age?

Is your husband/partner retired?

Did this influence your decision?

Financial aspect
Leisure aspect

Can you tell me about your husband/partner's income.

Do you, personally, have savings or a personal pension in addition to your teaching and state pensions?

Do you feel financially secure?

LIFE COURSE AND PERSONAL LIFE

Could you tell me about your marital status during your teaching career?

Have you been the main breadwinner at any stage?

Do you have children or stepchildren?

With regard to balancing work and family life, could you give me an idea, perhaps chronologically, of periods when you worked full-time or part-time?

Have you had any career breaks?

Did they affect your teaching career?

What was your experience of returning after a career break?

Can you tell me about any moves that you have made, either geographically or to a different job, and why?

How would you describe the effect, if any, of these moves on your career?

Would you say that you generally find it difficult or quite easy to adapt to change?

If you were starting your career now, would you choose teaching again?

APPENDIX 10
BRIEF BIOGRAPHIES: WORKING PRIMARY TEACHERS

WP1 ...went to Grammar School, and enjoyed it so wanted to teach. Bemoans loss of grandparental involvement, and parental support of school ethos. Good job satisfaction despite changes. Would retire if she won lottery, but attracted to flexible retirement. Married 30 years, has two children, took 5 years out for children and has only moved jobs for promotion or to a better job. Sees change as a challenge but thinks educational changes have gone too far, too quickly. Found OFSTED stressful. Thinks the inspectors seem nice 'but their daggers are in their pockets.' Doesn't think she'll be 'living it up' on her pension and few savings but has no mortgage. Husband still working.

WP2 ...always wanted to teach and as a child made up sums for her brothers and sisters. Found teaching a good career with a family because of long holidays. Educational changes caused disruption at first but, once settled in, were good. Trained as an OFSTED inspector so that she knew the 'rules of the game.' Thinks that children have poorer behaviour and social skills when they start school nowadays and parents have poorer parenting skills. Went through a stressed stage when she became 'more grumpy' and 'smoked and drank more'. But came through that. Gets enormous job satisfaction and a 'huge buzz' from her headship. Married with two children. Just took maternity leave both times and went back to her old job. Grew up in Kent and came to this city for a 'change of scene' when she married. Taught TEFL abroad for 2 years. Finds change challenging and would choose teaching all over again. She'd like to retire soon because she's tired and has been teaching from 21 to 53 with only two maternity leaves! Financially not possible as youngest is only 16. Will probably supply teach and do inspections in her 'retirement.' Will get good pension but has 'miniscule' savings.

WP3 ...got married the day after she left college because living together 'wasn't an option in those days.' Became a teacher because it wasn't nursing or hairdressing and ended up a head teacher. Thinks the national curriculum has been a positive thing but that there have been too many changes over all. Thinks that many children have emotional problems because of unstable and dysfunctional family lives. Gets cross at the public perception of long holidays because you need them to prepare for the following term. Feels that the training older teachers had didn't prepare them for the job they're doing today. Married and has two children. Had a three year break then taught for two years part-time. Good to have same holidays as children. Has taught in schools from 'leafy suburbs to council estates'. Been head of current school for 16 years. Thinks she adapts well to change. Has been through times when she felt like 'giving it all up'. As a head you can't be part-time so it's 'all or nothing', though there are a couple of heads jobsharing in a nearby city. Admits that younger teachers are cheaper teachers when trying to balance the school budget. Teaching pension is an incentive to keep going during the last few years. Her husband retired early from ill health and that has been another reason for keeping going. Would leave if an incentive was offered or if she won the lottery.

WP4 ...started teacher training at 34 having taught typing and computers part-time. Trained at university and feels teachers are respected less nowadays than they used to be, and parents are defensive about their children. There's a lot of stress and little sympathy. Finds it 'easy' to accept change. Already, after only 11 years, says that she wouldn't choose teaching again. Would give up if she won lottery or if a retirement package were available. She would love a change of career. Has been married for 30 years and has 1 child.

WP5 ...enjoys teaching but not record-keeping and paperwork. She is married, worked full-time until she had children, took maternity leave and worked full-time again afterwards. She has lived in the research city for 10 years and has moved jobs only for career advancement. She sees change as 'a challenge rather than a problem' but recent educational change has been too fast and far-reaching. However, she thinks that changes in society are worse – poor parenting skills, poor language and communication skills, and bad behaviour. 'Change keeps you fresh.' She would retire if offered a retirement package, doesn't have savings, and does have a mortgage. She believes that teaching is convenient for mothers in terms of holidays but less so nowadays and that children are more demanding than in the past and need to be 'entertained'. She thinks that parents used to be more appreciative, but now are more likely to defend their child and feels that teachers are respected less. She dislikes the stress of constant assessment but gets job satisfaction when children succeed and make progress.

WP6 ...is still working only because she's a head teacher. She is nearly 60 and intends to go on to 64 or so. She was ill last year and could only cope because of her mixed daily routine with classes and in her office. Job satisfaction outweighs stress by a long way. She would like a way of taking part pension and working part-time but can't be part-time head, and thinks that some staff leave full-time teaching because of the attractions of supply and not being tied to a contract. She is married and has three children. Feels she will be financially secure in retirement because her pension 'pretty good.' Has few savings and her husband is retired and tells everyone he's a 'kept man'. Had a 12-year career break during which she did fixed term contracts, supply teaching and ran a youth club. Has taught in lots of schools and 'can't think of any change that's really thrown me'. Enjoys teaching and would choose it again. Believes that teaching is good for holidays but still need before and after school care, especially nowadays. Thinks OFSTED inspectors should give shorter notice to minimise stress for teachers. She is sad that children are no longer read bedtime stories and instead 'have a video.' Doesn't have a problem with parents and says there have always been good and bad ones. Thinks primary school teachers are still valued and respected more than secondary. ICT had a big impact on stress, was a new skill for probably 90% of primary staff. Personally likes challenges but aware that she chooses what happens as head whereas class teachers have less choice.

WP7 ...believes that the government moves the SATS goalposts so that the 'right' number of children pass them, so standards vary from year to year. She feels that stress is greater now and 'classrooms are supposed to look like John Lewis showrooms'. She loves the job and wouldn't choose any other, but the way it is now tends to deter people from seeking promotion. She's acting deputy head 'by default.' She is married and worked for 4 years in one job before having her 2

children, then took 15 years out from full-time. Did supply roughly half-time 'all over the place'. Always lived in this city and moved house to 'upgrade'. Has been in the same school since returning full-time. Doesn't 'balk' at change and thinks it can be good. Boring to do the same things over and over but doesn't believe in 'change for change's sake.' *Introduction of IT has been difficult for older teachers.* Would choose teaching again and feels 'very valued.' Is very active both inside and outside the class. Runs dance clubs that put on shows, enter competitions and perform at festivals. But 'extras' have been reduced because of other things like OFSTED and paperwork. Her school had a good inspection and is to be amalgamated with a school in special measures: she's not sure that it will work well. She will probably go at 59 rather than move for one year. Believes that superannuation should be paid for full-time supply teaching. Has savings and no mortgage. Her husband was a primary head teacher but had a heart attack and now works as an education consultant on the city council. Always wanted to be a teacher and used to play 'schools' as a child. Regards it as a convenient career for women both 'then and now.' Holidays are good but would prefer less in exchange for more free Sundays. Educational changes have been 'horrendous' but now settled in. Paperwork is enormous, SATS an 'absolute nonsense.' Feels that teacher assessment and OFSTED question the professional status of teachers. New profiles for children have 109 boxes for each child...

WP8 ...would retire if a package became available, if she won the lottery or 'came into money' and would not be interested in supply teaching. She is married, has two children and always thought that they would live off her husband's pension and that hers would be secondary. 'Didn't think' about savings and has a mortgage. Will retire as soon as her husband does. She became a teacher because she always wanted to and thinks it's only convenient if your husband/partner can support school age children's events. She is concerned that some children starting school now can only string 2 or 3 words together. Believes that parents are less supportive of teachers, less respectful and more defensive of their child. Thinks teachers are no longer treated by society as professional and that the public perception is of them having 'plenty of holidays and free time.' There is stress from many areas now and job satisfaction has diminished over the years. She worked full-time for 3 years then returned full-time after 9 years' career break for children. She has lived in the same place since returning to teaching when she went back at a lower level than she had left at. She had some pension 'out' to buy a dining suite, which seemed important at the time. She thinks of herself as 'adaptable to change, but the rate of change is demoralising.' She would not choose teaching as a career again.

APPENDIX 11
BRIEF BIOGRAPHIES: RETIRED PRIMARY TEACHERS

RP1 ...retired because her 'heart was no longer in it', she was stressed and the job had changed out of all recognition. Doesn't regret the decision. She does 2 days' supply each week and can go on holiday whenever she likes. It enables her to avoid paperwork and meetings and is paid well per hour. She started to feel tired and stressed about a year before actually retiring and decided not to struggle on. She spends time with her family, and her daughter who is expecting a baby. Enjoys cooking and gardening. Has a better relationship with husband now. Intense dislike of OFSTED, and not happy with bad behaviour of children. In a financial position to retire and thinks her colleagues who go on working probably aren't. Husband will retire in a couple of years and they then plan to travel. Married 2 years after starting teaching and had 2 children. Career has always been secondary to husband. Had started out hoping to become a head but after having children decided not to go for promotion. Lived in London until 4 years ago. Not keen on change – didn't like moving to this city, and didn't like moving to London after rural childhood either. Wouldn't choose teaching again as 'it's not the same job now'. Didn't really choose teaching but others chose it for her. It was a convenient career for 'mothers' not just women. OFSTED 'hellish' but other changes less awful. Didn't like the changes and was unhappy that teachers weren't consulted about them. Thinks that most children are 'lovely' but a few spoil things for them all. Parents defend their disruptive kids. 'Wrong' parents come to meetings. Status is lower than before when teachers were held in high esteem, but now have less autonomy. There was stress in early career because of inexperience, but you could teach what you liked. Now paperwork causes stress, together with testing and inspections. She still gets job satisfaction from children learning new things.

RP2 ...was the eldest of 7 children and always wanted to teach. She felt it was a vocation. Changes during career were very abrupt with little preparation and sometimes too much to cope with. Music has been enhanced by national curriculum, but non-specialist teachers find it difficult to teach. Dislike of OFSTED but then used it to her advantage to get improvements. Family ties used to be stronger and more secure and children did more in the family unit but now focus on TV, electronic games etc. Parents now more involved at school. Most are fine, but some are aggressive and threatening. Children aren't given structure from an early age. The most stressful time was the introduction of National Curriculum, then OFSTED. Had good job satisfaction through most of her career. Does supply teaching usually 4 days a week. Finds the idea of retiring completely 'frightening.' Concerned about finances. Her school needed to make a redundancy and 'earmarked' another member of staff who didn't want to go, so she decided she would. Would like to have been a professional bassoonist! Thinks that some of the changes 'weeded out' some of the poorer teachers. Husband isn't retired, but getting close to retirement age. Her pension is going to be in downsizing from her current house to something smaller. Has no savings and minimal mortgage. Both her parents died relatively young and she'd rather enjoy her money now than put lots away for unknown, possibly non-existent future. Married for first time during probationary year. Divorced after about 5 years and single mother for fifteen years. Main breadwinner when on her own, with little financial assistance from ex husband. Taught music in private schools and lessons to adults. Only gives financial assistance

to son, now aged 24 for 'SOS things.' Taught in 4 schools apart from supply, both in urban and rural locations. Would choose teaching again as a career.

RP3 ...is 'not a career person.' She has been married for 28 years and has 2 sons. She worked for six years after qualifying, and started back part-time when her youngest child was 3. Her mother helped with childcare. She had a term off for ill health four years ago and retired 2 years ago. She trained and taught in Liverpool, then moved to Birmingham and moved to the research city when she was expecting her first baby. She found moving house 'stressful and chaotic'. She 'probably' doesn't adapt well to change - 'I'm pretty conservative' – and thinks that teaching was a good career choice for women when she chose it but is less so now. She got enormous job satisfaction from teaching juniors and believes that supply is a good way of staying in teaching without all the downside of paperwork and other administrative tasks. Her father was a teacher and that encouraged her to train herself. She 'assumed' she'd get married and have children. Her male colleagues didn't worry much about OFSTED compared to the women: men were 'less bothered'. She feels that mothers now don't have enough time for children and infant teachers have taken their place doing many of the things that mothers used to. Parents are more aggressive and threatening and they, and their children, know their rights. They can't take criticism and the children have little idea of the discipline they need in the classroom. Stress has gone up and up but retiring has made a big difference. She couldn't 'switch off' before, but can now leave it behind at the end of the day. She had good job satisfaction and enjoyed teaching, but disliked the paperwork.

RP4 ...didn't want to go to university and would have been a 'dreadful nurse'! There were few choices so she became a teacher. She realised it was a convenient career when she had children. She used to develop projects and focus on reading, writing and maths. There were no guidelines, but then changes came 'thick and fast', without co-ordination or planning. Regards OFSTED as 'a show, a performance'. She finds that children now answer back and are less respectful and less disciplined. They come from complex family situations where 'fathers' come and go. They watch too much TV, and eat too many crisps and chips. The Government has encouraged parental involvement, but mothers are working nowadays and many don't have time. There is less respect for the teaching profession, an attitude that she thinks is media-led. But she also thinks that teachers have complained too much and lost public sympathy. Stress has increased 'immeasurably' and plotted on a graph would go up and up: paperwork is a 'big element' of stress. Involvement with parents is encouraged but it takes up time and is often with parents who don't need to see you. The other side of the graph would be job satisfaction going down and down. She retired because her husband was retiring and they wanted to do things together. Also, her mother was ill and needed care and she felt there was 'more to life than teaching.' She does some supply teaching and is planning to travel. Although the early retirement 'package' ended in 1997, she wanted to retire early anyway, just after that time. She thinks that most teachers, 'given a realistic choice', would retire. She has been married for 31 years and her husband retired recently. They agreed to live off his earnings for 2 years. He was a secondary school teacher. They have no mortgage, some savings, and she was also left some money. They have three daughters. She qualified at 21, worked for 5 years then moved here. She had a career break of 7 years and returned gradually because she thought it right to be at home with small children and babies, and thinks it's a shame that women don't, or can't, do that now. She believes that

mothers miss out and so do children. She 'didn't really have big career ambitions' and 'liked the chalkface.' She went back where she'd left off so was, in effect, 7 years behind but didn't mind because she is 'not a career oriented person'. She trained in Leicester and moved here before having her first baby. Her view of change is: 'if it aint broke, don't fix it!' She doesn't think she adapts to change very well and believes that the older you get, the more set in your ways you become.

RP5 ...'loathed' OFSTED inspections and thinks that women come off worse than their male colleagues because men 'didn't seem to make any special effort'. She married shortly after qualifying, has 2 children and 1 grandchild. Went back to teaching when youngest started school after 7- year break. Took a backward step and felt like a beginner again. She found it exhausting after years at home. Didn't like moving around much (within the city) but has been here since marriage. Doesn't like change much, the changes in schools have been 'fast and furious' and she found it difficult and stressful but thinks it's age-related. Would probably choose teaching again but wishes she'd left teaching before national curriculum, SATS and inspections. Resented job taking up evenings, weekends and holidays. Went to grammar school and had an aunt who was a teacher. Regarded it as convenient in terms of family. Burden of administration 'massive.' Children are now much noisier and those in the reception class aren't used to structure and routine in their lives. Most mothers work and that's difficult for some as they are obviously tired and rushed. Managed to have good relationships with most of her parents. Used to have more autonomy over teaching programme. Thinks teachers still have status with public and most parents. 'Whole forests have been felled in the name of all this change.' Stress increased – paperwork, reporting, administration, meetings. Teachers of her age want to teach not be administrators. Job satisfaction in relation to teaching and kids until she retired, but smaller part of job than before. Got little job satisfaction from administration. Left teaching for two reasons. Firstly, because of educational changes and social changes eg parents and children. Couldn't go through another OFSTED. Extra administration, form-filling, report writing, paperwork. Still dislikes computers. Secondly, the pull of home life, husband retired and wanted retirement together. Could afford it and had just become a grandmother. Wanted to rebalance her life towards her family.

RP6 ...believes that children 'don't get enough sleep, eat too much junk food and watch too much TV.' She thinks that the burden of administration of recent educational changes is enormous, that there have been 'huge policy swings' and that the changes have been too quick. The National Curriculum took away spontaneity and was 'change for sake of it'. She believes that OFSTED equals stress and found it demoralising to be criticised. She felt that there was a 'falseness' to the whole OFSTED process. She finds it harder to maintain discipline nowadays because children are noisy and parents don't discipline their children. They are less supportive, are 'ready with excuses' and can be menacing and aggressive. Problems worsen as children get older. Changes have eroded teachers' professional position and increased paper-pushing which wasn't what teaching was about when she started. She has experienced enormous stress and friends have become ill from stress associated with the changes. She had an 'awful' rash on her skin and got lots of headaches. And as for meetings: 'You name it, and I bet we have a meeting about it!' Job satisfaction has been 'spiralling downwards' over the years. The job is 'tiring and pretty depressing nowadays'. She is married and did supply teaching after her first child then went back full-time after her youngest had been at school for a year. She grew up in Manchester and moved here because of

husband's job because 'women were expected to go where their husbands needed to be.' She doesn't really like change and missed her family when they moved, especially her sisters. She didn't like speed of educational policy change, and felt that inspections were like a performance. She felt she 'couldn't go through another OFSTED', and was afraid she'd 'crack up'. She disliked the paperwork, administration, and computers. She has no regrets about retiring, and now does supply teaching, but would have liked a job share. She feels that she's now back to her 'old, calm self.' Her husband is retired and they planned their retirements together. He has a good occupational pension having worked for a bank, and as they have always saved and have paid off their mortgage, she feels financially secure for her retirement.

RP7 ...retired because teaching 'had taken over her life'. She couldn't face another OFSTED, wanted more time for other things in life and her mother needed care after her father died following a stroke. She and her husband decided to live off one salary. Doesn't regret the decision and is doing other things including supply teaching and voluntary work. Also does an art class, works in a charity shop, serves tea to visitors at Leyhill prison and plays badminton twice a week. Wanted to retire at 50 but the pension scheme rules changed before she reached right age, but she wanted to go anyway. She might have been persuaded to stay if her salary had been doubled! Her husband is retiring next year. He's also a teacher, teaches physics at a private school. They discussed it and agreed that he would continue until 58 and they would live off savings for a year until he got his full pension. They have some savings and no mortgage. 'There are more important things in life than money.' Went to grammar school and liked teaching but was too young to train so worked as an untrained teacher for a year. Teaching has 'changed beyond recognition' during her career. Acknowledges that it needed some structure but thinks it went from 'sublime to ridiculous.' Believes that OFSTED should have shorter notice because the build up is 'gruelling' and in the end it's 'just a show.' Infants are tired and spend too much time in front of the TV. Mothers are busier than they used to be and don't give their kids time. They defend their kids' poor behaviour or work when criticised. One parent told her she had 'the right' to criticise a teacher. There's more stress, and the job is more difficult and complex now. Paperwork is a big element of stress and she had problems 'implementing someone else's ill-conceived ideas.' Kids themselves are not a stress factor. She got a lot of job satisfaction because kids at 4 'soak it all up' and make rapid progress. She has been married for 31 years and has 3 sons in their twenties, including twins. Had a 7 year break – 'I thought I'd retired then!' – and went back part-time. She wanted to be there for her boys' 'big moments.' People suggested she went for deputy headship but 'I'm not a career person.' She liked the classroom. She thinks she's more set in her ways as she gets older and doesn't really like change. She wouldn't rule out the idea of teaching if she was starting her career but 'today it takes up weekends, evenings and holidays.'

RP8 ...tries to adapt to change but acknowledges she's not that good. She can't believe that she actually chose teaching as a career. Over the years she had good job satisfaction working with children but retired from teaching because of so many policy 'swings', continually changing emphasis, computers, jargon, the speed of change, OFSTED, lack of classroom structure, paperwork, and administration. She has no regrets and is still supply teaching. Had a few 'pangs' about returning to her old classroom for supply. Does an average of 2 days' supply where she used to work, and gets some pension. Her husband is self-employed and they planned retirement

together. Her husband has a fluctuating income but they have savings and no mortgage so she feels financially secure. She chose teaching as a career because of a mixture of school and parents' influence. Feels that the changes in education have been too 'thick and fast'. Says that although the National Curriculum was supposed to be 'the greatest thing since sliced bread' the government didn't get it right and had to change it. She thinks that the inspections give a false impression and that it would be better to have 'spot checks'. Discipline is harder nowadays in the classroom and parents are less supportive and more defensive. She still feels respected by parents and children as she's got older - more like a grandmother figure! Experienced stress over changes mostly about paperwork, administration and meetings! 'Meetings about ICT, staff meetings, parents' meetings.' Her school had high expectations and some of her friends and colleagues have become ill through stress. She herself had shingles last year. Job satisfaction has been 'on downward curve over the years.' She thinks that as stress has gone up, job satisfaction has gone down. Married in her late twenties, and had three children the youngest of whom is 18. Went back to supply teacher when her youngest was 3 and back full-time when 7. Her geographical moves had no real effect on her career and she admits that she 'went to Hull for a man!'

APPENDIX 12
BRIEF BIOGRAPHIES: WORKING SECONDARY TEACHERS

WS1 ...always wanted to become a teacher and 'never really thought about doing anything else.' Her current job is teaching in a comprehensive on a large estate in the research city where she is Assistant Head. Has only ever taught in comprehensives but went to a grammar school herself. Thinks the National Curriculum is a good idea, but its implementation 'crass.' Feels that for a child to be told they have failed at a young age convinces them that they can't pass anything and they 'opt out.' Believes that the lack of external moderation for Key Stage 2 exams means that grades are 'bumped up', the result of which is to set expectations too high in the early comprehensive years. OFSTED was 'the most stressful thing that I've ever done.' Critical of the way in which one badly behaved child can potentially ruin the school's inspection. Feels that many teachers feel that they 'can't jump through the hoops any more' and are leaving. She thinks there is pressure, under LMS, to take on younger teachers who are cheaper, but feels a balance of experience is better in practice. Finds parents 'much more aggressive and far less supportive' than in the past. When she was at school, she felt that teachers were 'really important people' but believes that teachers and probably most professionals have lost status. Thinks that, from her experience, the stress of teaching, in particular the stress associated with OFSTED, is a contributing factor in teachers' early exit from the profession. She is married, but does not have children and has not had any career breaks. She would have tried for headship, but at that stage her husband, who is head of a large comprehensive outside the city, was diagnosed with cancer. Enjoys the challenge of change, but would 'absolutely not' choose teaching if embarking now on her career. She 'can't wait' to retire and plans to do so with her husband. Believes that flexible retirement from teaching 'will be essential' in order to overcome recruitment problems because teachers don't want to teach in problem or failing schools. She has savings and a full pension and will pay off her mortgage by the time she and her husband retire.

WS2 ...has no plans to retire early because she enjoys teaching, but admits that 'some mornings I just feel physically less able to deal with the pace and hectic environment.' Likes new challenges and feels that teaching is changing so much that it feels like a different, 'new' job. Would like some kind of flexible retirement of part work/part pension but believes that even more people would opt for that and that it might not alleviate the retention problems. Believes that some of her colleagues find it harder to cope with change, whether in the education system or the head teacher, and others have things that draw them away from teaching such as their husband retiring. Would like to have been promoted, but when she was put forward the others going for the job were mostly younger. Because the job was given to 'a young ambitious male' she believes that there is possible sex discrimination as well as age discrimination. She is married and has 2 sons. She took a career break to look after them until the younger one started school. Has changed jobs a few times but just to get a better post. Believes that she is 'very adaptable' and has tried to look for the positives in the changes in teaching and education. 'It helps to look at them as a challenge and I like challenge.' Likes doing new things in her personal life too. Would choose teaching again as a

career because she finds it 'rewarding and satisfying' and loves working with children. It was a good career with school holidays and children but feels it's not so much the case now with longer working days. She thinks that most of the education policy changes have been good, though dislikes the additional paperwork. Feels that children have changed 'enormously' and believes that drugs are a significant influence on some of her pupils, as is what she perceives as an increase in the number of dysfunctional families. Finds low level disruption a big disciplinary problem, and despairs at the lack of sanctions with which to punish bad behaviour. Feels fortunate in not suffering from stress – 'I'm just that kind of person.' But dislikes the increase in paperwork and has to 'make a big effort to clear any backlog' and not let it build up to unmanageable proportions. She is someone who 'can usually see the positives in life' and is the kind of person who 'relishes a challenge' and 'challenging it certainly has been.'

WS3 ...was married 'briefly' during her twenties and has been single since then. She has no children and has a long-term partner who lives apart from her. She has not had a career break and has moved around England, teaching is numerous different cities and counties and enjoying the experience and variety. She says she loves change and is 'a bit of an adventurer' and feels that being single has enabled her to travel perhaps more than her colleagues who have children. Thinks she might be a lawyer if she was training now, but would still choose teaching if it were a choice between that and nursing as it was when she was 18. Enjoys being 'busy and active' and is not sure that retirement would provide that. Is not attracted to flexible retirement because she likes playing a 'full part in the day to day life of the school.' Feels financially secure in terms of retirement planning because of full pension and she paid off her mortgage as quickly as possible after she became single. She thinks that most of the education policy changes 'have ultimately been for the better' though the speed of their introduction was more of a problem. Believes that even if you think that OFSTED inspections should be about seeing the school as it really is, you are part of team and work together to ensure that the school is seen 'in the best possible light.' Children now tend to spend too much time with televisions and computers rather than taking exercise and reading which, she believes, lead to poor vocabulary and communication skills. The biggest causes of stress are classroom management and paperwork but she still gets great job satisfaction 'even in the bleaker moments.'

WS4 ...is losing her hearing and is worried that, if it continues to deteriorate, she may have to leave because her hearing aid amplifies background noise, which is a problem in the classroom. She has been looking at jobs in education but not in the classroom in case she needs to change what she does. She thinks that some of her colleagues have retired because of changes and how they perceive the effects will be. For example, when their school was getting a new head, several teachers left because they felt unable to cope with the change. She is married and has 3 children and owns a second property 'which is a kind of pension.' Her husband is self-employed and, although he usually earns 'a lot more' than she does, it changes from year to year. She had a career break for children, then returned quite gradually to full-time teaching and believes that there is age discrimination in the promotion process so that if you return after a career break and want to go for promotion, you can find it's already too late. She was Head of Department before

she left to have children and feels that she might be a Head by now if she hadn't taken time out. On change, she thinks she is 'fairly flexible and pretty accepting' of change and has helped colleagues to cope with change, such as a change of head teacher. Became a teacher because her older sister was already teaching and she 'loved English so thought it would be a good idea.' Says that 'you have to acknowledge that it's convenient with a family' though not so much nowadays. Feels that although the policy changes have been 'really hard work', most of the changes 'have made sense.' Thinks that OFSTED inspections are 'a pain in the neck' because although you try not to, you put in 'many hours of extra work in order to show yourself and your school at its best.' She thinks it's unfortunate that you are judged on 'a one-off or two-off visit.' Bemoans that fact that we are 'a less literate society and people get their entertainment elsewhere.' Also finds it difficult trying to accommodate such a wide range of ability and needs whereas in the past some of the children she teachers would have been in special schools. She is an Assistant Head and has to deal with parents coming in – 'usually to complain about something.' There is 'endless' stress and 'you can't ever switch off' so if you are unfortunate enough to be a perfectionist, you have to find ways of letting go and doing the best 'given the circumstances.' She is slightly frustrated in not getting another stage up the career ladder but believes she has to 'accept and recognise that it's partly because of my age and partly because I'm a woman.'

WS5 ...thinks that 'like father like son (or daughter)' sums up the disciplinary problems in her secondary school, and that 'every problematic pupil is matched, almost inevitably, with a problematic father' – or mother. She also finds that some parents are 'marvellous and supportive of their kids' and attend thinks like plays and parents' evenings. On education policy, she felt that there was a time when changes were so frequent that 'it was a nightmare' but suggests that the situation is more settled now. For her, inspections were 'the worst of all.' She thinks that the behaviour of a majority of children is fine, but a few spoil things for everyone 'in terms of bad behaviour, bad language, bad manners, bullying and general anti-social behaviour.' She also finds that children are 'permanently tired.' She believes that the education reforms 'weeded out' some of the 'dead wood' in the teaching profession and that it was 'probably no bad thing.' Disruptive pupils cause her more stress than the increase in paperwork and general administration and, although she finds the job exhausting at times, she still has a high level of job satisfaction from her work. She is married, has two children and admits that her husband's job has always come first 'though he's always respected my love of my work and my need to work.' She returned to work part-time when her younger child was 2, and full-time when she started school. She 'likes a challenge' and feels that 'change is often challenging in one way or another.' She would not consider early retirement or leaving teaching unless something unforeseen happened that demanded all her time and effort. She believes that those who do retire prematurely do so because of stress, finances or family factors.

WS6 ...has 'always been career oriented and motivated to get to Head of Department.' However, she doesn't think that she and her husband could have 'coped' with both being heads. She returned to work full-time when her only daughter was nearly 2 and was torn between home and work but thought she would be a 'better mother' after work than if she was 'doing it all day.' She moved to the research city when single for a better job and met her husband here. She believes that 'every job and

everyone's lives have ups and downs and you just have to get on with it. That's life!' She thinks that there are always good aspects to change and has adapted to new school situations relatively easily. She has found teaching 'very fulfilling and rewarding' and loves the job 'warts and all.' She chose to teach because she preferred that to 'being a nurse or whatever.' She believes that it does fit well with family life and that there was an assumption when she made the decision that she would get married and have a family. In education policy terms, she found the change from grammar to comprehensive more problematic than more recent reforms. The process was 'muddled' with unfinished buildings and 'unrest' amongst some of the staff who didn't want to teach across all abilities. She found it challenging to take on less able pupils, but 'soon got used to it.' More recently, although finding inspections 'a bit of a nightmare,' she feels that the inspectors are more positive now and 'don't seem to be quite so overtly and bluntly critical.' She believes that social change is 'not all bad' and that knowledge of computers and access to many sources of information is 'an enormous boost and helpful to their studying.' She particularly enjoys teaching A level students because of their enthusiasm for the subject. At younger ages, she thinks there are too many distractions and discipline is more difficult. When she started teaching 'pupils mostly did as they were told, produced their homework on time and neatly done, wore their school uniform properly and never answered back!' Efforts to keep control can make life stressful but she gets job satisfaction from seeing her successful pupils go on to university having achieved good results. She appreciates the security of a teaching job and of the pension and has no plans to retire early because she likes being 'busy.' She thinks that some teachers stay for financial or personal reasons whilst others retire for the same reasons but in different situations. She believes that there is sex discrimination in teaching in that men get promotion more than women and whilst acknowledging that many women teachers aren't ambitious, there are many others who go for promotion and are 'passed over in favour of men.' She suggests that perhaps people still think that 'women are less managerial and would be less good at being head of a secondary school.' She thinks that women teachers are more likely to retire early if the have 'not put so much into it' in terms of promotion. She is planning to retire at the same time as her husband who is a head teacher.

WS7 ...used to play 'schools' as a child with her older sister and both of them became teachers. She was affected by the change from grammar to comprehensive and felt it was 'a shame' that good teachers left because of their prejudices and being 'set in their ways.' She doesn't believe that there's a single teacher who likes OFSTED inspections and knows some teachers who left or retired rather than face another one. She thinks that 'image' is a big problem for teenagers and that 'trying to be cool takes up so much of their time – fretting about wearing the right clothes' and she feels that many girls dislike sport because they're embarrassed. She finds that many of her pupils 'suffer from a perpetual state of tiredness' and thinks it's a 'shame' that so many of them are not supported by their parents, some of whom are aggressive and 'try to defend the indefensible.' She finds that 'stress can be overwhelming at times but intends continuing teaching until 60. She is not attracted by a flexible retirement because she is 'an all or nothing person.' She thinks that colleagues have retired because of stress, ill health and an inability to adapt to or accept change. Whilst not thinking that there is age discrimination as such, she believes that the 'thick and fast' policy changes have been more difficult

for older teachers to contend with. She is married, has a son and daughter both now in their twenties, and her husband is a bit older than her and will retire first. He enjoys cooking and 'has every intention' of cooking and housekeeping. She likes the idea of 'having a house husband' but will 'believe it when she sees it.' She had a career break for her children and returned full-time when the younger child was 7, taking a lower post and having to 'almost start at the beginning again.' She believes that change 'can be fun if you're always aware of the positives rather than the negatives.'

WS8 ...had to go back on the 'bottom rung' on her return from a career break of 5 years until her daughter started school. The situation was made worse because the National Curriculum had been introduced while she was away, so 'it was quite a shock.' She was also going through a divorce at the time. She feels that changes are sometimes upsetting 'but you have to embrace it and get on.' She prefers things to be 'stable and secure' but feels that she's become more flexible and open to change as she's got older. She has no early retirement plans because she 'likes to keep busy' so at 52 has 'no intention of retiring.' She also feels that she can't afford to retire since her divorce. She thinks that some women teachers retire because of financial circumstances, stress or illness, and also because 'some have real problems adapting to change.' Financially she feels unable to consider leaving teaching because she has no savings and a 'big mortgage' that she's solely responsible for. However she enjoys her work and would not retire – 'even if I won the lottery I'd still want to work.' She believes that most of the education policy changes were positive and that, before them, 'there were a lot of 9 to 4 teachers.' Feels that there is an 'anomaly' between Key Stages 2 and 3 when 'pupils can appear to go downhill for a year.' She was made Head of Department shortly before an OFSTED inspection and resources were made available to her following a weak report, something that she believes might not have been tackled 'without official recognition.' Children's behaviour has deteriorated 'incredibly' which she believes is a reflection of society, and she finds that 'things like dope really affect performance and behaviour.' There is also less respect and both children and parents 'ignore sanctions.' She believes that 'stress in teaching is all about how you as a person handle things in your life' and always finds her job 'stimulating and challenging' – 'I enjoy teaching here, in a macabre sort of way.'

APPENDIX 13
BRIEF BIOGRAPHIES: RETIRED SECONDARY TEACHERS

RS1 ...felt 'exhausted and a bit out of touch' on returning to teaching when your younger child started school. She has lived in the research city throughout her teaching career and has taught in several different schools. She 'relishes a new challenge' and since leaving teaching has joined a friend who set up an internet business. She had become 'increasingly disillusioned' with teaching and felt the offer was an opportunity that she should take. She was 'persuaded' by her mother to train as a teacher 'because it was supposedly good to combine with family life.' She, herself, was 'busy having too much fun' to consider the fit with family and babies. She feels that nowadays the job has changed with longer hours and working at weekends and holidays. She found the change from GCE to GCSE 'significant' and was less affected than primary colleagues by the National Curriculum. She feels that since then policy changes have been 'going round in circles' and seem 'experimental.' She believes that discipline now is 'appalling' compared to when she started teaching, and that there are 'too many disaffected pupils' who are disruptive for others who want to behave and work. She thinks it unfair to generalise about parents because most parents are 'doing their best' but some are 'unsupportive and unhelpful.' She regards teaching as 'a great career' that can be 'so rewarding and fulfilling' with a well-behaved class being 'an absolute joy,' but feels that things have changed and that classroom management is stressful. Because of this, she has no regrets about leaving and felt that she was not doing the job as well as she had done in the past. She gets 'a real buzz' from what she is doing now and doesn't regret her decision to leave teaching. Her husband is still working and 'wants to work forever.' She acknowledges that this may have influenced her own decision, not because she hoped to spend time once retired with him, but because, given his desire to continue working, she was attracted to a new work-related challenge during her fifties. She appreciates that way that, in her current work, the rewards are more directly related to the effort she and her partner put in, a connection that she feels 'isn't really there in teaching.'

RS2 ...decided that the offer of a redundancy package, due to falling school rolls, was her 'big chance to get out.' She had considered part-time teaching but preferred the idea of a new challenge. She now works for a building society and went on various IT courses to improve her skills because she realised that she would be 'up against' younger people with better skills in the job market. She and her husband have two daughters and she had 'the minimum' time out. Her parents helped look after them when she returned, after which she was quite quickly made head of department, a job she stayed in until she 'retired.' Her mother was supportive because 'she would have loved to have been a teacher herself.' She went to university in London and moved to the Study City during her career break. She doesn't particularly like change but actually sought a change of career as a way out of an 'unsatisfactory situation.' She thinks that a teaching career is convenient with a family in terms of school holidays. She started teaching in a grammar school and enjoyed the 'culture of enthusiasm for work...and life.' She found it an 'enormous shock' and 'huge upheaval' when the school became comprehensive. She believes that disciplinary problems have their roots in that change due to the size of schools and 'the number of children who simply weren't

interested in what they were being taught.' OFSTED inspections had a 'huge impact' on some of her junior staff who were 'almost having breakdowns.' But she thinks the worst aspect of educational change is the publication of league tables and the way that parents are encouraged by the government and media to judge a school solely on them. She is concerned about the smoking of 'dope' during lunch times, bullying, and selfish and dishonest behaviour. Finds some parents are only 'supportive' when it concerns their child's poor behaviour. Believes that many parents are too 'indulgent' of their children. She found the job increasingly stressful and no longer got the 'great satisfaction and fulfilment' from the job that she had in the past. But she loved teaching A level right to the end.'

RS3 ...has one daughter and was widowed four years ago, when she was 48. She had a six-month career break, returned to part-time teaching for a year and taught full-time from then onwards. She was welcomed back 'with open arms' because her post had not been successfully filled. Her mother looked after her daughter and 'they still have a wonderful relationship to this day.' She thinks herself 'pretty adaptable' but realises from recent experience that people go through different phases in their lives when change is more or less difficult or acceptable. When her daughter was young, she wanted stability for her, and she wasn't interested in major changes after her husband died. But now she feels that change and new challenge are a good and positive thing, so she doesn't think that attitudes to change 'necessarily stay the same all your life.' She wouldn't choose teaching again because she would prefer a career 'where success in your work is more clearly related to success on the career ladder and your bank account!' She feels that you can work 'tirelessly and conscientiously' in teaching and not get rewarded for your efforts. She feels that in 'the real world' you don't get on unless you pull your weight. The only place she would teach now would be in the private sector, though she never believed she'd think that way. She regards the publication of league tables as the 'most significant and negative change' and bemoans the fact that too many pupils 'don't see the point of learning.' She feels that some parents 'can't be bothered' to come up to the school because 'they're busy watching television or at the pub.' She experienced stress when she started teaching because of her inexperience, but feels that 'it's a different kind of stress' now, particularly in discipline where 'it only takes a few 'bad apples' to make life in the classroom pretty hellish.' She left teaching because 'circumstances conspired to make it possible.' She only regrets her decision during the school holidays when she has to work. She enjoyed her teaching career but had done it for a long time and saw her redundancy as 'an opportunity not to be missed.' She would have stayed in teaching had the redundancy not been an option. She initially wanted the comfort of a familiar job after her husband died, but then wanted a new challenge. She considers herself 'a saver rather than a spender' and feels financially secure having no mortgage and some savings.

RS4 ...described her redundancy package as 'a gift' offered with only two months' notice. She has no regrets about her decision and had felt physically and mentally exhausted in recent years. She didn't want to do supply teaching because she'd 'had her share of stress' and was determined to find a new working environment that was stress-free. She did some IT training and temping, then found a job in an estate agency which needed 'a lot of chat, charm and time management.' She misses the 'glorious holidays' now that she only gets four week's holiday a year.

She feels that teaching is a good career for a mother, but didn't think about that aspect at the time. She was involved in the change from grammar to comprehensive and found it 'very traumatic,' added to which the school leaving age was raised to 16 which caused 'an enormous problem dealing with a lot of disaffected kids.' The size of the school was a problem too because there were '360 kids in each year' so her subject (Home Economics) became 'a conveyor belt of classes' and there was no opportunity to 'get to know the kids.' The impact of the National Curriculum was 'absolutely huge' and in primary schools, where she briefly became an advisory teacher, 'it was overwhelming.' She found OFSTED inspections difficult because 'you can never predict how kids are going to react.' She feels that 'the effect of the disaffected has an impact on discipline and also makes a work ethos impossible to achieve.' She acknowledges that in schools in disadvantaged areas 'there are so many parents who are struggling themselves to actually cope with what life's thrown at them.' During her career 'stress grew and grew and grew' partly because she was teaching full-time and was in charge of assessment, reporting and working out the timetable. She is married and has one child. She had a five-year career break during which she did supply teaching. She had been head of department and had to take a lower post and a cut in salary on her full-time return. She decided that, even when the city council became responsible for the city schools, she was not prepared to commute long distances to the 'better' schools. She feels that she doesn't find change easy to adapt to, yet she has in some ways sought change and she does like a challenge. She thinks she would train to be an accountant if embarking on a career now.

RS5 ...studied biology at university and became a teacher because the opportunities were 'so limited' in science at that time. She married on completing her PGCE and taught in a secondary modern school, as a supernumerary teacher, where she 'had to get to grips with all sorts' including taking cross-country. Her husband's career has 'been the more important one and has taken priority' (he is now head of a comprehensive in the Study City) and they moved to Kent because he found a job there. She then taught biology in a technical school She took maternity leave which had only just been introduced, but 'you had to go back after six weeks.' She recalls 'a lot of tut-tutting from parents' but she was committed to the job and wanted to resume her career. After two terms she realised she wanted to spend more time with her daughter so took a break from teaching and had a second daughter. During that time she joined, then ran the 'Housewives' Register,' an organisation for professional women at home with their children. They met to have 'intellectual conversations': there was also a toddler group and a book group attached to it. She found the transition from CSE and O levels to GCSE 'an enormous change.' She was head of biology when the 'mega changes' of the National Curriculum were introduced, when 'you felt as if you were reinventing everything' only five or six years later. She recalls that some schools 'just didn't bother, just changed things slightly' and she thought 'they'd probably got the right idea.' She found OFSTED 'a real trauma' and had a very difficult class who 'played up,' but she was still awarded a special rating. She thinks that children have become 'much more difficult' are that's one of the reasons for her leaving teaching. Her self-perception also played a part because she felt she 'wasn't coping any more' and couldn't remember children's names (she was taking 8 classes of 30 children in a day!). She always had plenty of job satisfaction and enjoyed teaching, particularly at A level. She doesn't like change and feels 'it's a

confidence thing.' She has enjoyed her teaching career but might consider primary teaching if starting again. Her new job with a recycling consortium has involved spending time in primary schools, which she feels have a more family oriented atmosphere where the teachers 'help each other out' and are a 'more close-knit community.' Teaching science in a secondary school was 'gender-related' with far more male than female teachers. She initially left on a sabbatical year, started a second, and then took a retirement package. She feels that in some ways she left too early but she didn't want to 'go downhill' and not do her job properly. She enjoys her new work because it's less constrained and there's no 'regimentation by bells.' She was offered a managerial post but was unenthusiastic about being office-bound rather than in schools and the community, so is now managed by someone younger 'who knows nothing about the job and has no experience.'

RS6 ...wanted to be a policewoman but wasn't tall enough! She was musical so decided to combine her hobby with work. She thinks teaching is a good career for women because of the 'equality' in that, if you've got your mind set on promotion, you can go up the career ladder to the top. She doesn't have children and feels that those who have a family need a 'very understanding partner' who shares that commitment to career and promotion. She felt that education changes in the 1990s were 'going round in circles' and lacked structure. OFSTED was stressful and would be better with shorter notice, but she felt that 'some staff do need to be inspected for the sake of the students.' She finds that students' spelling and grammar tend to be 'appalling when they come to write something without a computer' and that some 'can't even spell their home address.' (Years 10 and 11). She used to deliberately 'bump into' parents who had missed parents' evenings and invite them in for a coffee and a 'chat' about their child, but she feels that some parents 'put their job first' and don't give enough time to their children. She believes 'that element of fearing the police and teachers and all their sanctions' has slipped away and kids nowadays know their rights. Disruptive behaviour was a key source of stress and a reason for her retirement, plus the paperwork and meetings. Also, the job 'never really goes away' and she did most of her planning at weekends. Teaching 'really is a way of life.' 'I saw it as a career and, not being married, I put my heart and soul into it.' She 'definitely got job satisfaction' and came away from her teaching career 'on a high' with 'positive thoughts about teaching.' She would have 'soldiered on till the end' had her school, where she was acting Deputy Head, not been closing. She found herself 'in quite a quandary' because she had the option of moving to another school but was concerned about fitting in to a new regime in her fifties. She now works for the Study City College, and liaising with schools and setting up vocational courses such as hairdressing, car maintenance, IT and catering. She lives alone but has a long-term partner who is retired, and whom she feels has influenced her to 'work a bit less and play more golf.' She feels financially secure and has good pay in her current job as well as a good pension from teaching full-time throughout her career without a break. She thinks teaching is 'a very challenging career now' and that there is a significant difference between teaching 'in an inner city school with all its problems' and 'in a leafy middle class, more traditional environment.'

RS7 ...retired from teaching because a friend had opened a boutique and wanted her to go into the business with her. She had been 'moaning about teaching' so she and

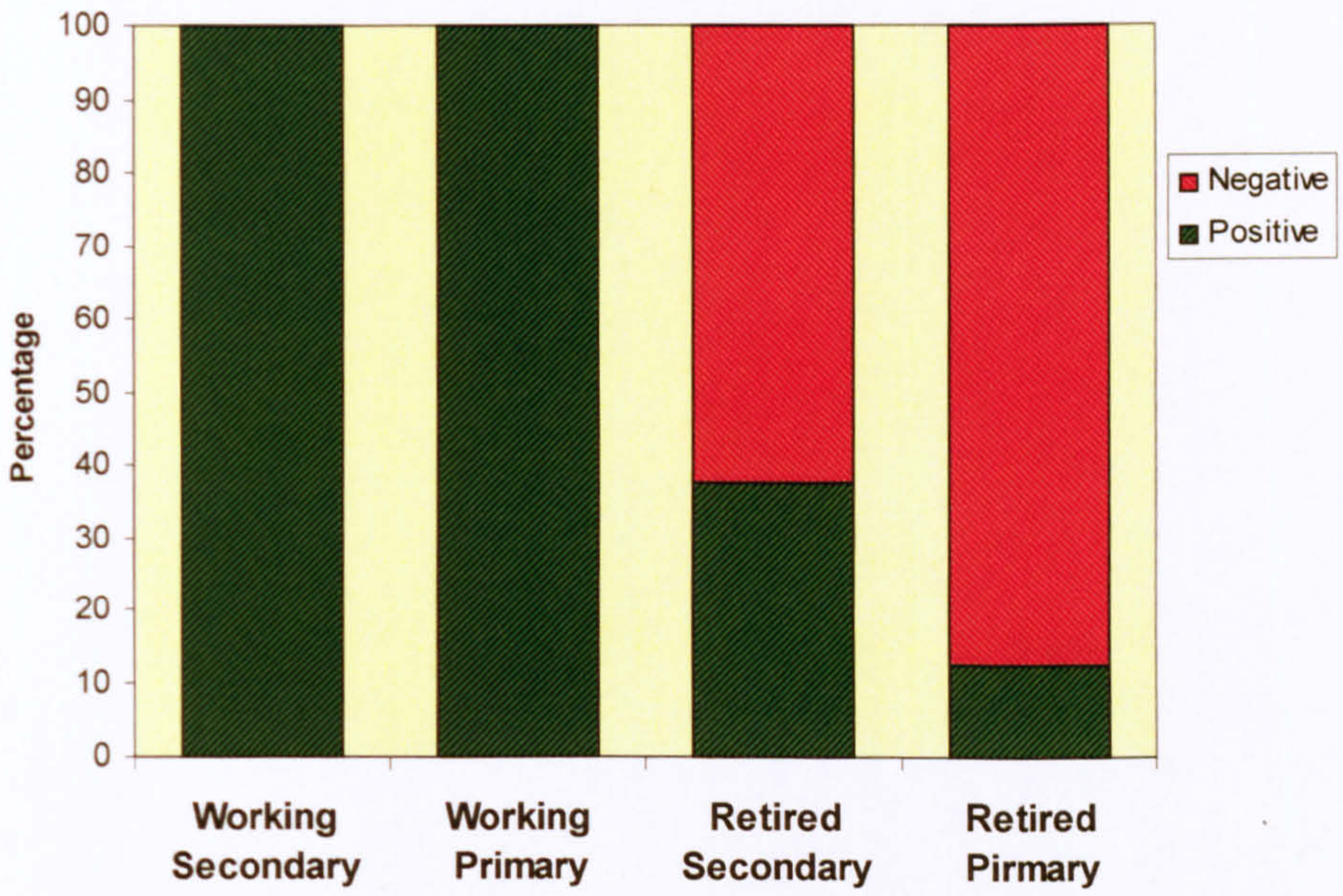
her husband discussed it because there would be uncertainty as to her income and she would not be entitled to her teaching pension for several years. But their two sons were financially independent, and she had been feeling 'physically tired all the time' which were two incentives to make a change and take up a new challenge. She missed the holidays and has had little time off because, fortunately, the business is flourishing and they're so busy that they're considering employing someone else. She had been 'dreaming' about leaving for several years and some colleagues had left before the pension regulations changed, but she'd missed out. Her husband is still teaching in an independent school where there is a 'far better work ethos, and parents support both their children and the work of the school.' She feels financially secure with her husband still working, the new business going well, savings and no mortgage. She started her teaching career in a grammar school and, during her career break, she moved with her husband back to the Study City where she grew up because he had been offered the job he is still in. His career 'has always taken priority.' She returned to teaching when her younger son started school. She felt she was then 'behind' her male colleagues who hadn't taken time out, and was less confident than previously because others had 'moved ahead' and she felt 'inadequate.' But she overcame this and was promoted soon after her return. She doesn't like 'change for the sake of it' but does like 'a bit of a challenge' and although her new work is tiring, it's a different kind of stress that's 'really rewarding.' She'd like to be a lawyer if she were choosing her career today, 'because it's an option for girls nowadays.' She's glad that she went along the university + PGCE route, because 'teacher training colleges sounded too much like boarding school.' She disliked the speed of change and its ongoing nature – 'the sheer number of changes, and then changes to the changes!' SATs were 'a nightmare' if you were teaching in an inner city school with a high ratio of children 'from poor and unsupportive backgrounds' because 'a teacher can't achieve better results in isolation.' OFSTED was stressful because 'if your class plays you up, you're doomed.' Disciplinary problems were high on her list of work 'push' factors because kids have 'attitude' and 'answer back and even ridicule punishments.' Plus the problem of drugs and drink when she has taught classes in the afternoon when the kids have been drinking or smoking at lunchtime.

RS8 ...has been married for 30 years and has 3 children – 'if you can call them that!' She had 10 years out of teaching until her youngest started school. She didn't feel committed on her return but soon got 'back on track.' She found it challenging dealing with the job and three quite young children, and returning just as SATs were being introduced. She has an 'if it aint broke, don't fix it' mentality, though she feels that pupil behaviour does need fixing. She regrets that there are few sanctions available and feels that some pupils are 'biding their time until they can leave' because they feel that education has nothing to offer them. On education policy changes, she felt that she was 'on a treadmill of change' always trying to keep up with new initiatives 'like being a hamster on a wheel.' She feels that education 'increasingly caters for mediocrity' with able pupils not challenged and teaching to tests which tends to be 'boring and prescriptive.' She feels that OFSTED inspection 'strike fear in even the most sanguine teacher' and 'don't give an entirely honest picture.' She thinks that many parents are not only unsupportive of the school and their child, but also allow them to be out 'till all hours during the week.' She is critical of pupils' 'bad language outside the

classroom and poor vocabulary inside it.' They are rude, swear and are abusive to staff and fellow pupils, and she feels that, although only a few are really bad, 'the number of bad eggs has increased.' Towards the end of her teaching career, her job satisfaction had 'plummeted' and when a retirement package was offered, because her school was closing, she 'wanted out' – 'the offer was irresistible.' She feels guilty sometimes because she now spends so much time doing as she pleases – 'it seems almost self-indulgent.' She has become involved with a local environmental campaigning group, which takes up 'a surprisingly large amount of my time' but gives her a 'real focus.' She also does part-time private tutoring of GCSE pupils and spends her leisure time on yoga, golf and 'brushing up' on her French. She feels that, because 'younger teachers are cheaper teachers,' older staff are compelled to stay in the same job. She is married to a teacher who will be retiring in a 'couple of years' and the decision for her to retire was a joint one. They are financially secure, partly because of her retirement package but also because he will have a full pension at 60, they have savings, and they are 'certainly more secure than people whose pension value has dropped and who won't be in the position they expected to be in.'

APPENDIX 14
RESEARCH SAMPLE: LIFE COURSE DATA

1. TEACHERS' ATTITUDES TOWARDS CHANGE IN THEIR PERSONAL LIVES



2. TEACHERS' ATTITUDES TOWARDS CHANGE IN THEIR WORKING LIVES